SALIENT® MANAGEMENT COMPANY

Salient Interactive Miner™ 5.x

Training Guide

Introduction & Technology Summary

Getting Started in 6 Easy Steps

Practical Applications

Salient Collaborative Intelligence Suite

Data Mapping, Acquisition, Transformation and Loading:

Salient ETL™
Integration tool for database mapping

Choice of alternative ETL

Intelligence Processing:

Analytical Data Mart
Capable of scaling up to billions of records.

Desktop UIs:

Analytical Workstation
Advanced visual data mining application

Knowledge Manager
Collaboration hub for knowledge sharing.

Optional Add-ons:

Geo Analytics
Analyze geospatial data in Analytical Workstation

Salient360™
Excel plugin to connect to Analytical Data Mart

N-Tier UIs:

Drillable Dashboards™
Analytics on-the-go for quick consumption

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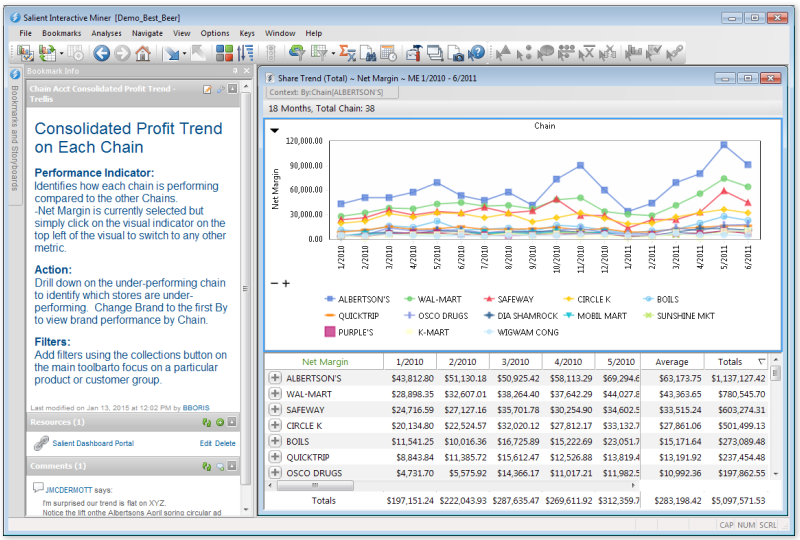
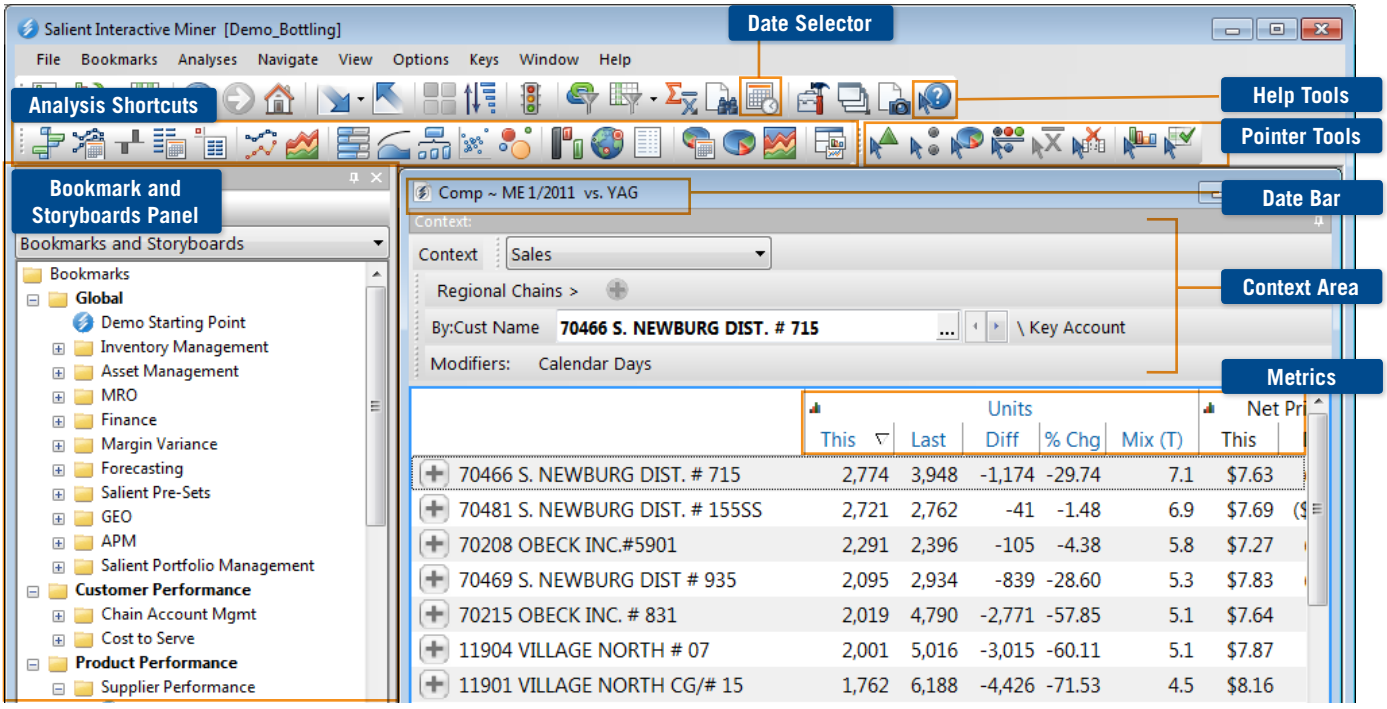

Salient Interactive Miner [Demo_Best_Beer]
Consolidated Profit Trend on Each Chain
Performance Indicator:
Identifies how each chain is performing compared to the other Chains.
-Net Margin is currently selected but simply click on the visual indicator on the top left of the visual to switch to any other metric.
Action:
Drill down on the under-performing chain to identify which stores are under-performing. Change Brand to the first By to view brand performance by Chain.
Filters:
Add filters using the collections button on the main toolbarto focus on a particular product or customer group.
Share Trend (Total) ~ Net Margin ~ ME 1/2010 - 6/2011
18 Months, Total Chain: 38
Chain
Net Margin
ALBERTSON'S
WAL-MART
SAFEWAY
CIRCLE K
BOILS
QUICKTRIP
OSCO DRUGS
DIA SHAMROCK
MOBIL MART
SUNSHINE MKT
PURPLE'S
K-MART
WIGWAM CONG

- Self-Service for Business Users
- Drill-Down Logic Out-of-Box
- No Query Writing

The Salient Interactive Miner (SIM) provides the intuitive tools your team needs to analyze business questions, from high level overviews to root level causes. The following document will guide you through the basics of the SIM interface and provide you with the ability to examine your business from top to bottom.

Getting Started:
The SIM Workspace



Getting Started in 6 easy steps

1. Select the Time Frame
2. Choose the Context
3. Match an Analysis to Your Question
4. Insert the Corresponding Metrics
5. Save and Share Intelligence
6. Drill Down to Underlying Detail

Most managers have a specific business situation that they want to analyze or question deeper when they use SIM. By following these 6 logical steps, you will quickly and easily be able to engage the appropriate analysis, and find meaningful, actionable information. Then, save and share logical bookmarks with your colleagues.

Important! In addition to this Getting Started document, there is an extensive help section within SIM.
Two ways to access it are:

Click on the help pointer and select an item in question.

Click on the help icon to view the entire help document.

1 Select the Time Frame

Set the time period that relates to your question.

Click the date dialogue box.

Date options vary slightly depending on which analysis you've chosen:

For example:

- **Comparative**—Identifies totals for one or two time periods
- **Trend**—Identifies trends for one time period
- **Comparative Time Series**—Compares two trends

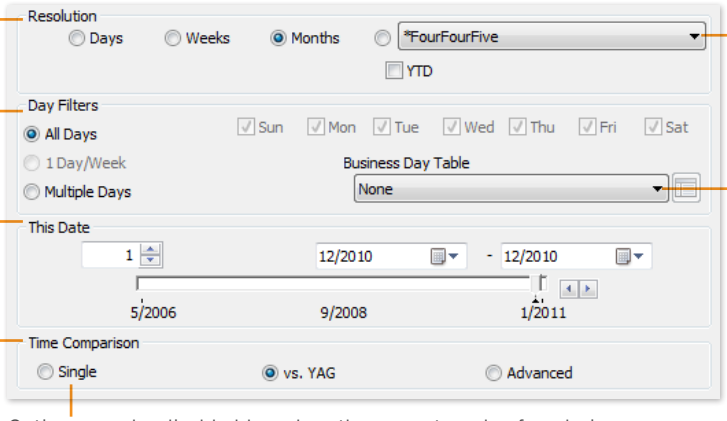
Set up your own customized time frame to analyze.

Set the resolution

Filter on certain days (if applicable)

Choose the time frame ("**This**" date range)

Select previous period to compare against current period. Compare against an equivalent date range one year earlier (YAG) or use the Advanced setting for a custom time frame.

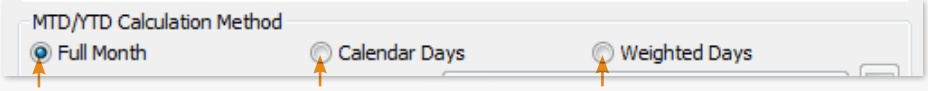


System administrator configures custom settings (such as calendar periods)

Options may be disabled based on the current mode of analysis. Change the analysis mode to enable relevant settings if desired.

Incomplete month options

Select an option for incomplete months:
On View menu, select Modifiers. In MTD/YTD Calculation Method section, select an option:



Incomplete month vs. complete month last year—"gap" or "goal" perspective. For example, January 1–15 this year vs. full month of January last year.

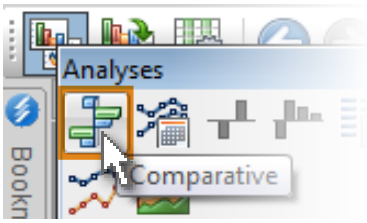
Compares same number of days this year and last — most precise "gain/loss" vs last. For example, January 1–15 this year vs. January 1–15 last year.

Weighted days are customized factors that must be set up by your system administrator.

2 Choose the Context

Select how to group the data.

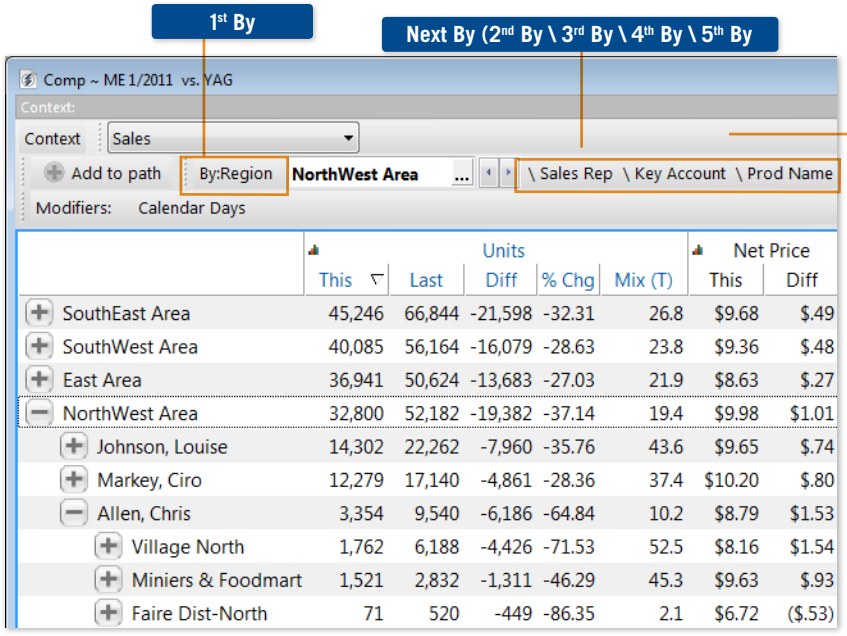
Let's start with the Comparative analysis for this lesson.



Use the Numbers/Graph Toggle if you are not already in a grid view

Pick your subgroupings:

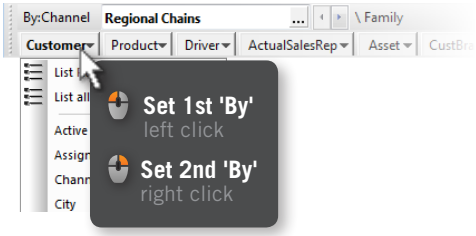
The By (1st By) shown below controls the groupings shown at the highest level. The 2nd By controls the subgroupings that you would see next when expanding an item or drilling down. Additional levels of subgroupings are available as you continue to expand, using the plus symbol on each row.



	Units					Net Price	
	This	Last	Diff	% Chg	Mix (T)	This	Diff
SouthEast Area	45,246	66,844	-21,598	-32.31	26.8	$9.68	$.49
SouthWest Area	40,085	56,164	-16,079	-28.63	23.8	$9.36	$.48
East Area	36,941	50,624	-13,683	-27.03	21.9	$8.63	$.27
NorthWest Area	32,800	52,182	-19,382	-37.14	19.4	$9.98	$1.01
Johnson, Louise	14,302	22,262	-7,960	-35.76	43.6	$9.65	$.74
Markey, Ciro	12,279	17,140	-4,861	-28.36	37.4	$10.20	$.80
Allen, Chris	3,354	9,540	-6,186	-64.84	10.2	$8.79	$1.53
Village North	1,762	6,188	-4,426	-71.53	52.5	$8.16	$1.54
Miniers & Foodmart	1,521	2,832	-1,311	-46.29	45.3	$9.63	$.93
Faire Dist-North	71	520	-449	-86.35	2.1	$6.72	($.53)

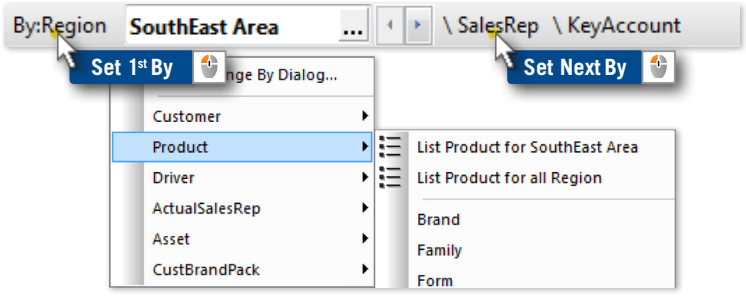
Tip: Right-click here to access options to hide "key tabs".

If key tabs are on



(Note: this was for version 4.8 and earlier)

To change the groupings and subgroupings.

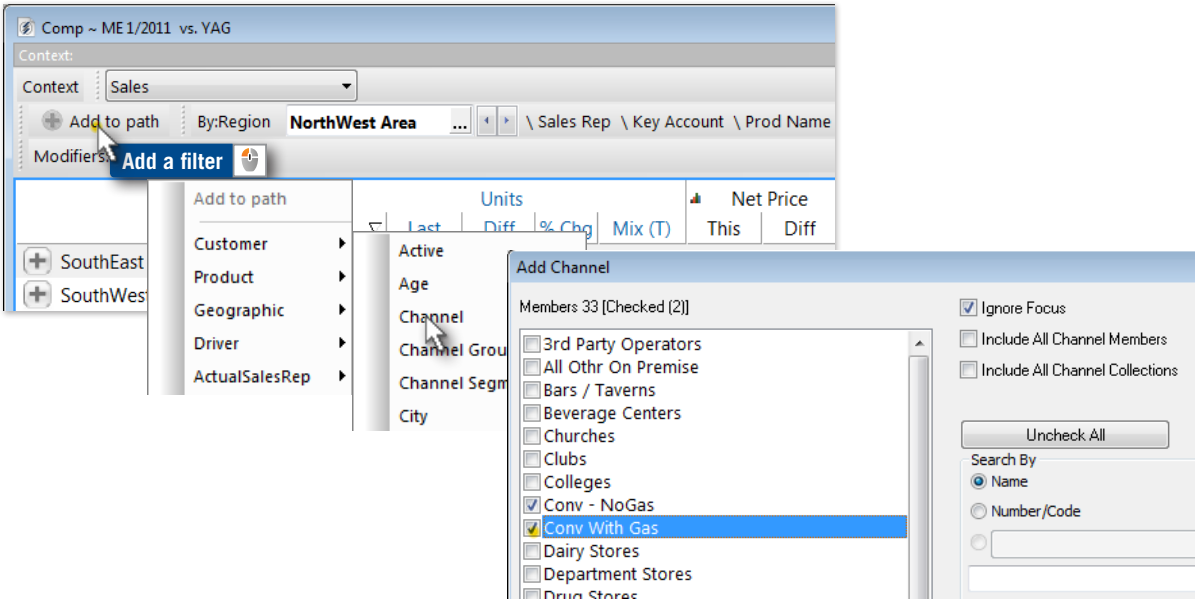


2 Choose the Context (continued)

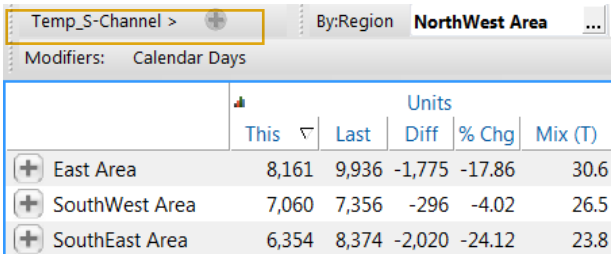
Choose the part of the business.

Narrow down on a subset of the data by adding a filter to the path, drilling down, or using collections.

Add to path:

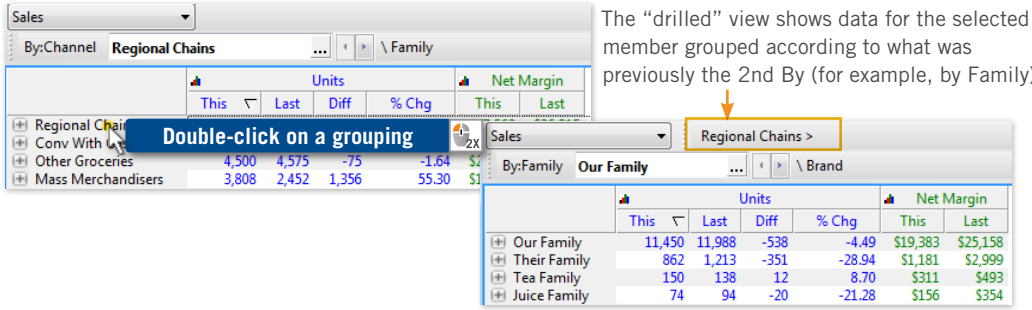


The resulting view shows data for only the selected item(s) using the same method of grouping the data as the previous view. You can repeat to narrow down to the exact information needed.



	Units				
	This	Last	Diff	% Chg	Mix (T)
East Area	8,161	9,936	-1,775	-17.86	30.6
SouthWest Area	7,060	7,356	-296	-4.02	26.5
SouthEast Area	6,354	8,374	-2,020	-24.12	23.8

Drill down:

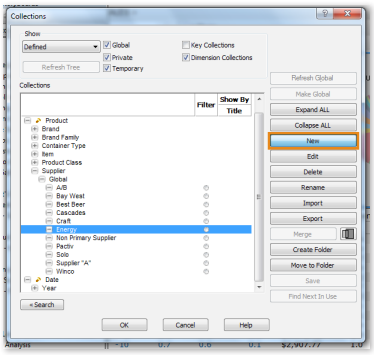


The "drilled" view shows data for the selected member grouped according to what was previously the 2nd By (for example, by Family).

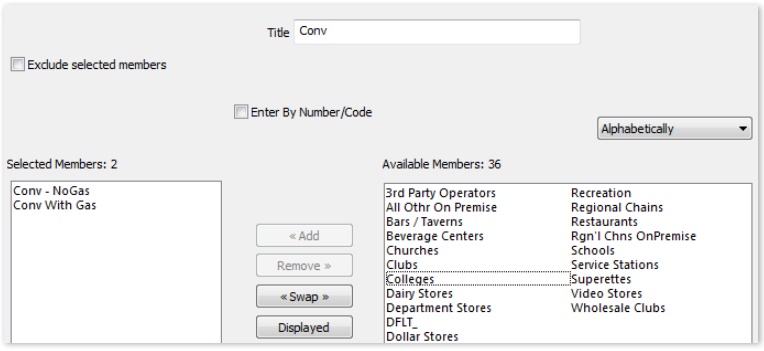
2 Choose the Context (continued)

Collections: How to create your own filter (also see "Of These" on page 49)

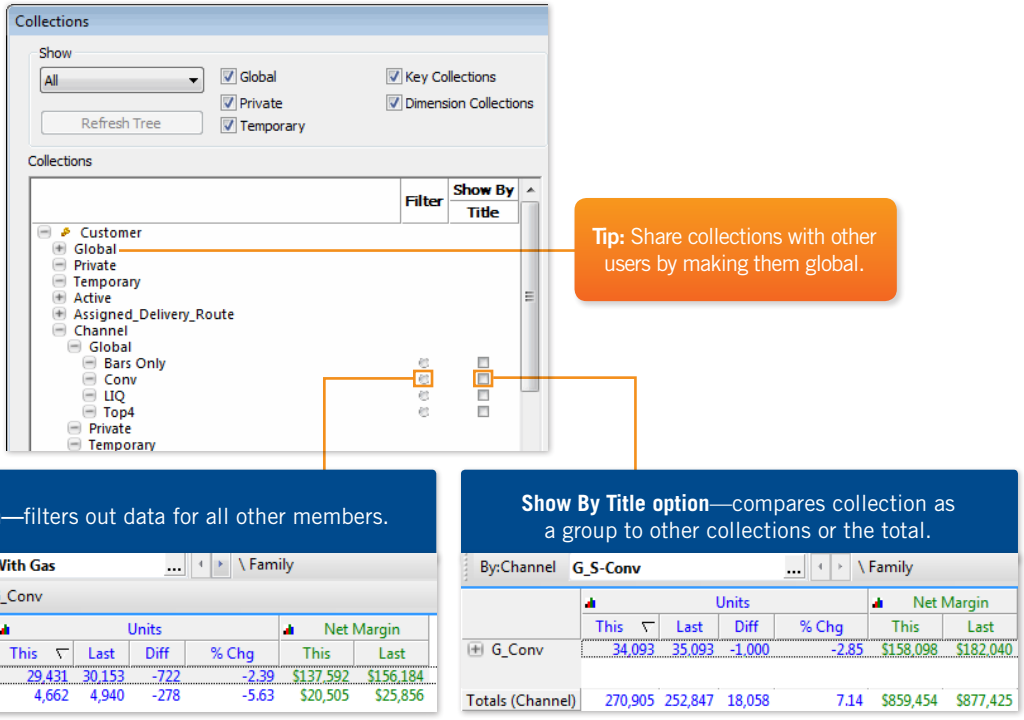
Select the button, then navigate the tree structure to the area you want to group (e.g. Group of brands/ suppliers/customers/etc).



Click New.

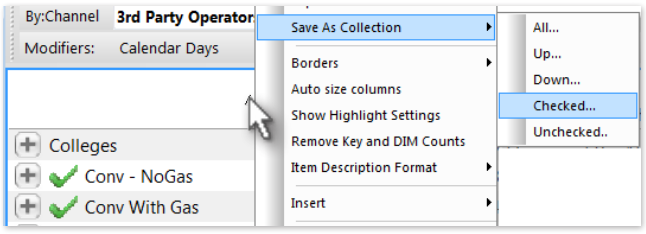


Turn a collection on.



Alternative Method

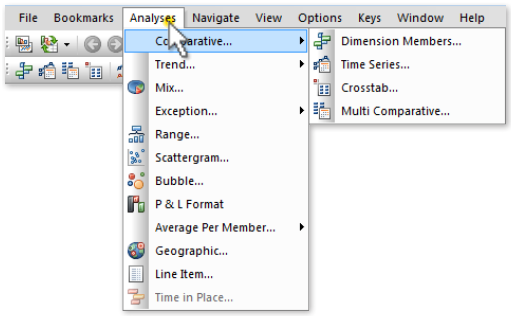
Use the check pointer tool ( ) to check the desired members and then click the options arrow and choose Save as Collection > Checked.



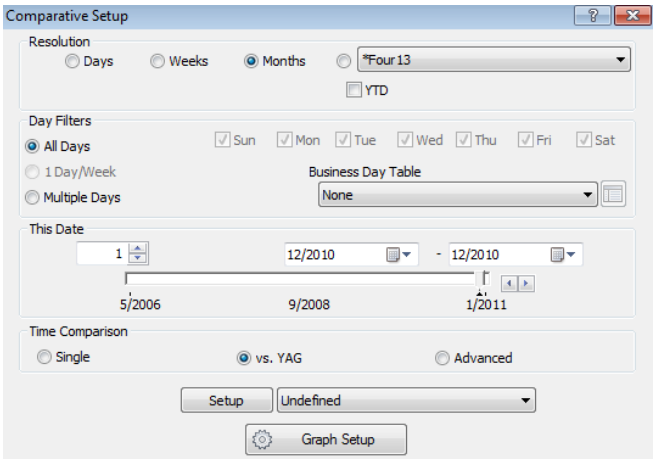
3 Match an Analysis to Your Question

Please refer to the examples section to identify which analysis to pick.
This page will provide some related tips.

Analysis Setup—select from menu.



The menu option opens a setup dialog for the analysis.



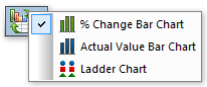
Numbers/graphs

Switch between numbers and graphs.

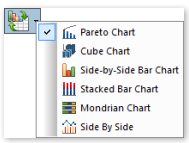
Select a graph format.

For example:

Comparative

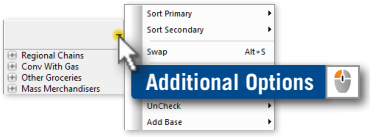


Crosstab

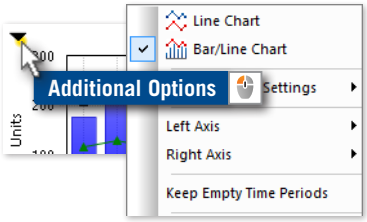


To see options for each analysis type

To see additional options in numbers views, place your cursor over the upper-left corner and click the arrow.



To see additional options in graphs, click the arrow in the upper-left corner.



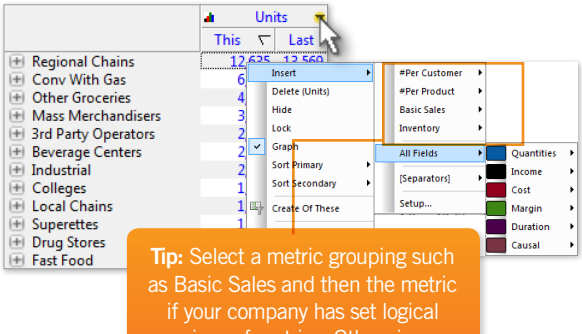
Additional Concept:

An alternative way to get to an analysis setup is to right click on the icon.

4 Insert the Corresponding Metrics

Insert metrics (revenue, margin, units sold, etc.) in numbers views:

Mouse-over and click the arrow to pick from any integrated data or right-click a heading column.



Tip: Select a metric grouping such as Basic Sales and then the metric if your company has set logical groupings of metrics. Otherwise, you can select from a submenu of data categories that include Quantities, Income, Cost, etc.

Show variance, mix and other computations

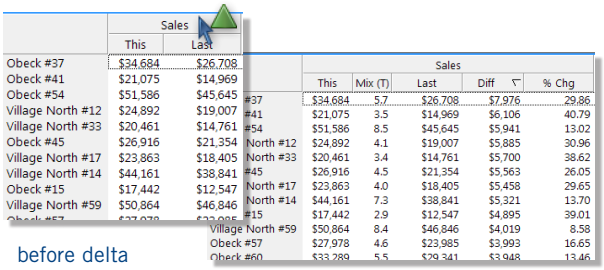
Select a Pointer Tool

Delta—shows difference and % change.

Average—shows average value per period.

Mix—shows mix % versus the total.

– After the pointer is engaged, click on a column to use it.
– Turn off pointer after use

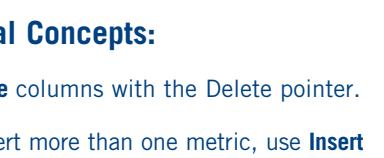


before delta

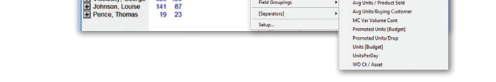
after delta

Additional Concepts:

1. **Remove** columns with the Delete pointer.
2. To insert more than one metric, use **Insert Some**.



3. Some metrics are calculated and you may view the formula with a mouse over. **Double click to expand and see the components.**



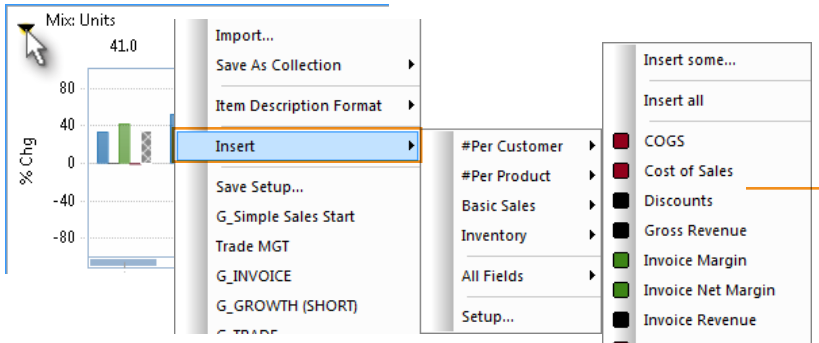
4. Configure highlight settings for metrics by selecting View > Highlight Settings on the menu.
5. If set up by the Administrator, "Modifiers" allow you to change equivalent numerical views.

6. **Unit/Total** toggles between per unit and total values.
7. In some analyses (Stacked Trend, Multi Comparative-2, Geographic, etc.), click the Change button to change the data field.
8. In key lists, you can also insert properties (name, address, etc.) and dimensions (channel, sales rep, etc.). See Advanced Concepts section.

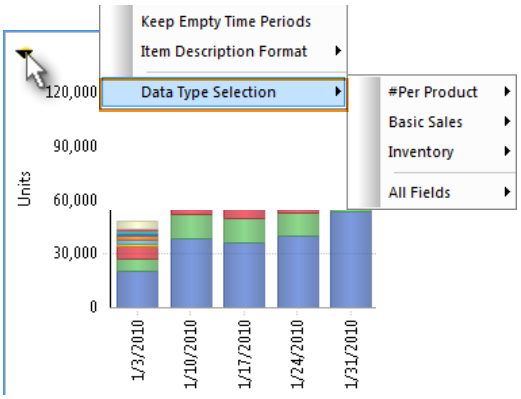
4 Insert the Corresponding Metrics
(continued)

Select metrics in graphs: The method for selecting metrics in graphs depends on the analysis type and graph format.

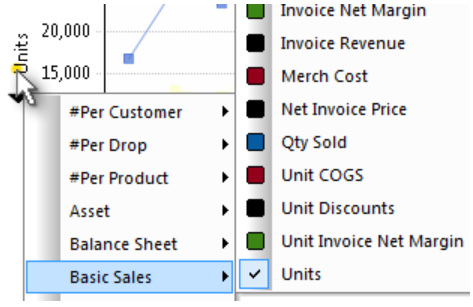
Options menu: In most graphs, you can click the arrow in the upper-left corner to open a menu with options for inserting or selecting the metric.



Tip: If you do not see the metric listed, it could already be part of the numbers view but turned off for graphs. Use the following procedure (Mix and Comparative Time) to mark fields for graphs.



Graph label: In many graphs, you can click the graph axis label to change the metric.

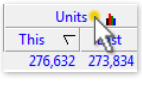


Mix and Comparative Time:

Use the following instructions to select data in Mix and Comparative Time graphs.

Step 1: Switch to numbers.

Step 2: Engage Graph pointer



Step 3: Select Columns to graph (Add columns if necessary using instructions on previous page.)

Step 4: Switch back to graph.

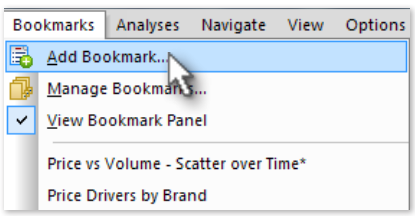
5 Save & Share Intelligence

Bookmarking, exporting, copying to clipboard, emailing, and printing are all methods that you can use to save and share intelligence. Also see "Storyboarding" and "Macros" in Advanced Concepts.

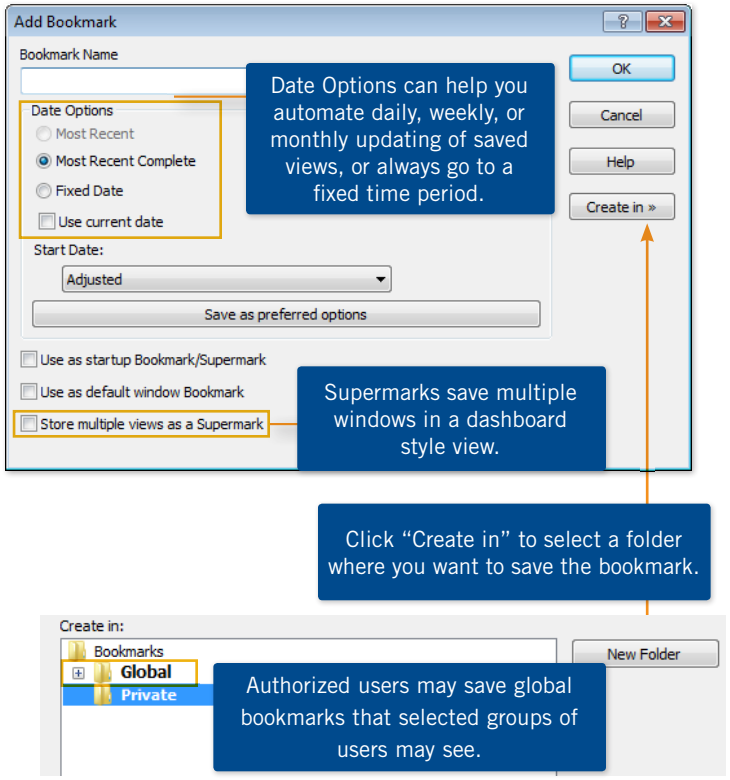
Bookmarks

Create a bookmark

Step 1: Configure the view that you want to save (choose analysis, choose context, set timeframe, etc.).

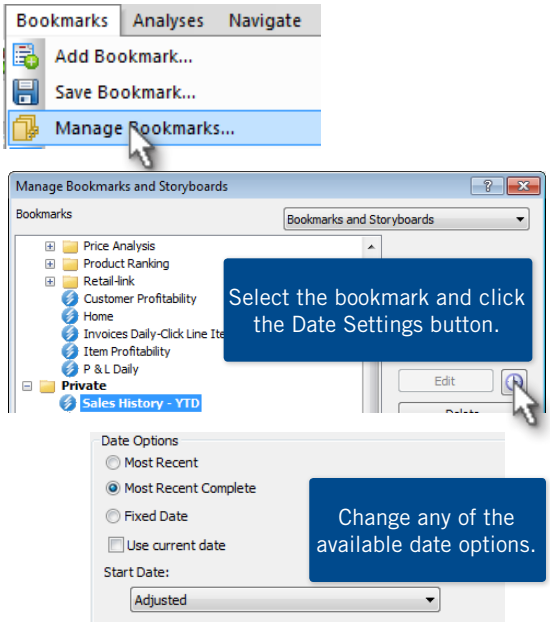


Step 2: Add bookmark: Select Bookmarks → Add Bookmark.


Add Bookmark
Bookmark Name
Date Options
Most Recent
Most Recent Complete
Fixed Date
Use current date
Start Date:
Adjusted
Save as preferred options
OK
Cancel
Help
Create in »
Use as startup Bookmark/Supermark
Use as default window Bookmark
Store multiple views as a Supermark
Date Options can help you automate daily, weekly, or monthly updating of saved views, or always go to a fixed time period.
Supermarks save multiple windows in a dashboard style view.
Click "Create in" to select a folder where you want to save the bookmark.
Create in:
Bookmarks
Global
Private
New Folder
Authorized users may save global bookmarks that selected groups of users may see.

Edit a bookmark

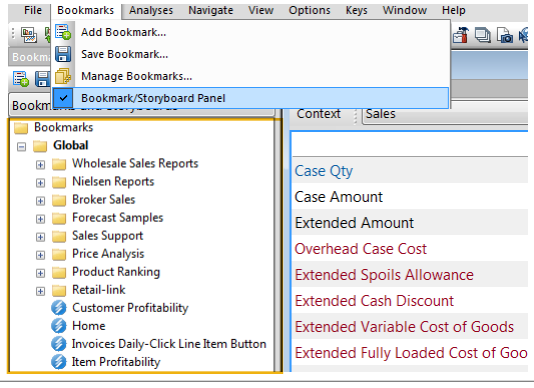
You can change the date options for a bookmark at any time.



For any other bookmark edits (context, analysis type, format, etc.), you must open the original bookmark, make changes, and then resave the bookmark using the procedure to the left.

Bookmarks panel:

The bookmarks panel makes it easy to open and manage bookmarks. You can turn this panel on in the Bookmarks menu.

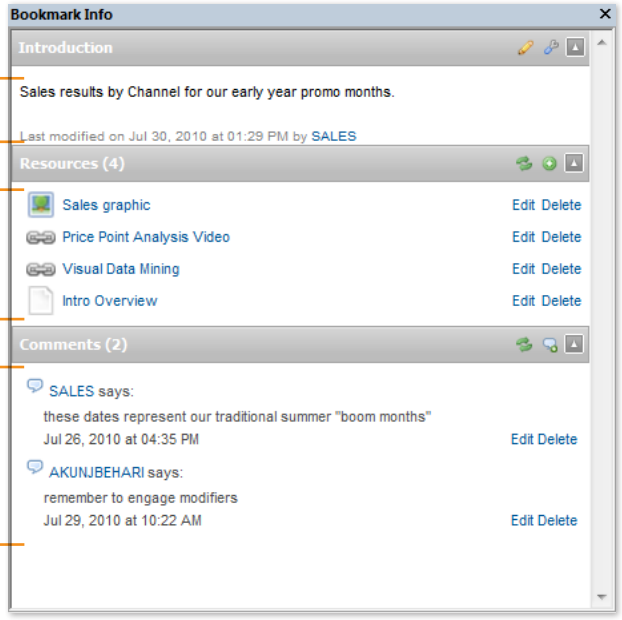


5 Save & Share Intelligence

After a bookmark is created, a description and explanation of its use can be saved in the Bookmark Info panel of Knowledge Manager.

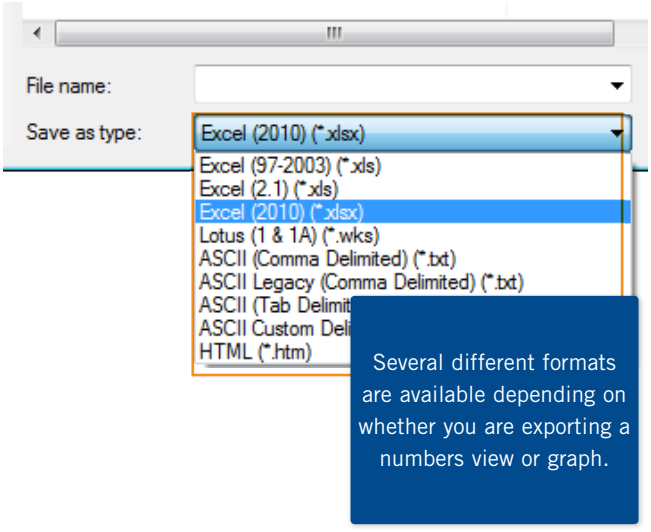
- A brief description of the captured issue and explanation of what is displayed.
- Any additional resources (promotional flyers, brochures, technical documents, etc) can be linked for instant access.
- Comments help document when and why the bookmark was created plus suggestions for improving or changing the issue presented.

Contact Salient for help with initial install.



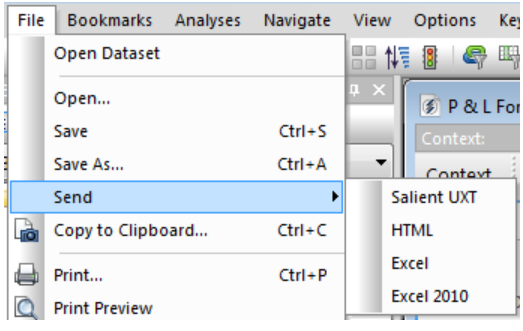
Export

File → Save As


File name:
Save as type:
Excel (2010) (*.xlsx)
Excel (97-2003) (*.xls)
Excel (2.1) (*.xls)
Excel (2010) (*.xlsx)
Lotus (1 & 1A) (*.wks)
ASCII (Comma Delimited) (*.txt)
ASCII Legacy (Comma Delimited) (*.txt)
ASCII (Tab Delimit
ASCII Custom Deli
HTML (*.htm)
Several different formats are available depending on whether you are exporting a numbers view or graph.

Email

File → Send



6 Drill Down to Underlying Detail

Investigate beyond charts & graphs into actionable details.

Survey data for categorical outliers.
Expose underlying value drivers.
Identify root cause behaviors.
Refine, adjust, and **execute** based on findings.

Sample "Investigate" Use Case

Step 1: This example view identifies customer performance based on price and volume.

Step 2: Most of the customers buy along the familiar curve of high quantity, low price and low quantity, high price. Some; however, do not...

Step 3: Who are they? Rubberband to get a list of the outliers, including the price they get by volume sold.

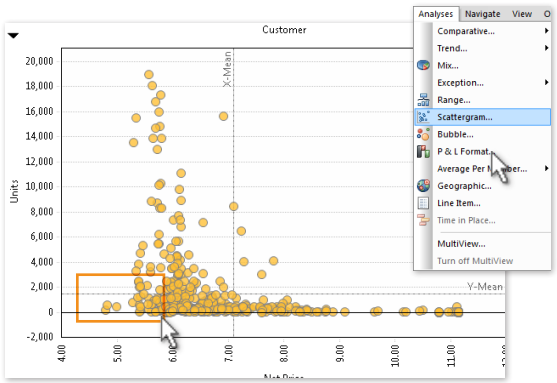
Who sold to these accounts?

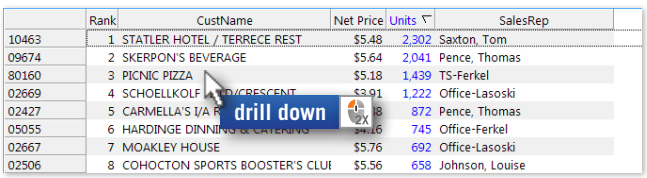
Step 4: A manager can now contact the Sales Rep to see why these customers are getting such aggressive pricing given their low volume.

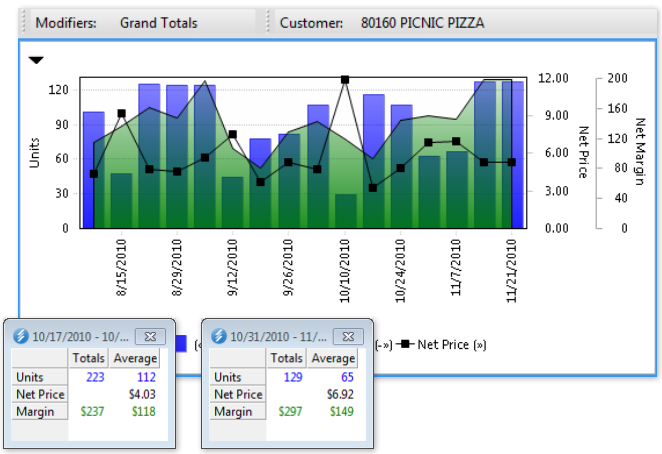
Step 5: Drill in on a single customer and view results over time. Correlate changes in price with volume and margin.

Step 6: Compare volume, price and margins before, during, and after a discount event to improve promotional performance.

With the information in hand, the sales rep can make the necessary adjustments and keep track of results with the Salient solution.



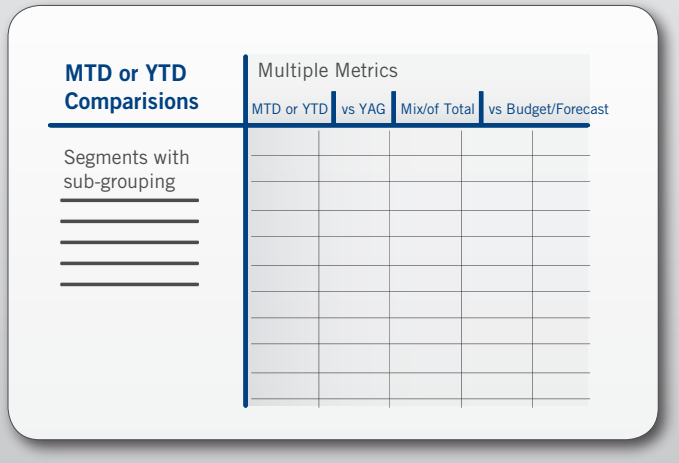

Rank CustName Net Price Units SalesRep
10463 1 STATLER HOTEL / TERRECE REST $5.48 2,302 Saxton, Tom
09674 2 SKERPON'S BEVERAGE $5.64 2,041 Pence, Thomas
80160 3 PICNIC PIZZA $5.18 1,439 TS-Ferkel
02669 4 SCHOELLKOLF $3.91 1,222 Office-Lasoski
02427 5 CARMELLA'S I/A R 872 Pence, Thomas
05055 6 HARDINGE DINNING & CATERING 745 Office-Ferkel
02667 7 MOAKLEY HOUSE $5.76 692 Office-Lasoski
02506 8 COHOCTON SPORTS BOOSTER'S CLUI $5.56 658 Johnson, Louise
drill down



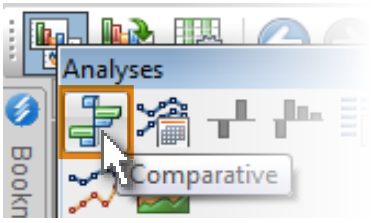
Bookmark Building Segmentation and Measurement Basics

MTD or YTD vs YAG

Identify gains & losses for MTD or YTD vs. Year Ago (YAG) or budget comparing multiple metrics and any business segment subgroupings.



1. Analysis: choose the "Comparative"

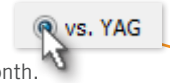


Use the Numbers/Graph Toggle if you are not already in a grid view

2. Time frame: Select most recent month or period

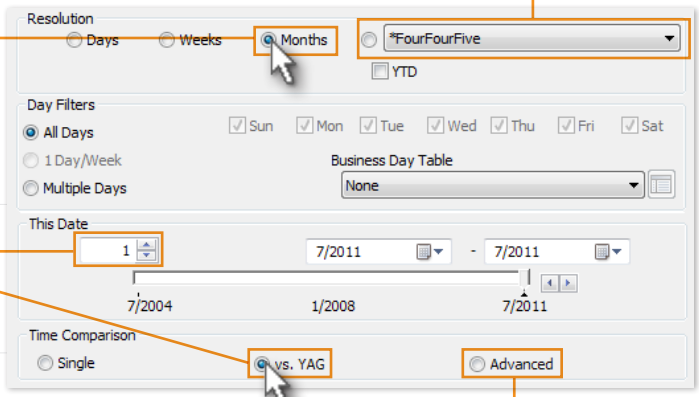
(or select the current month if you have forecasts or "future time periods" in your data-set.)

Select comparison period



Compare to YAG or other prior month.

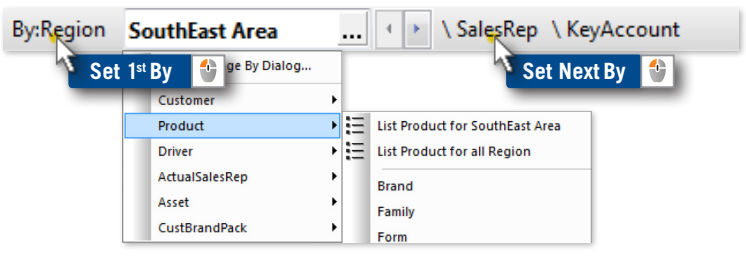
Select an option for incomplete months:
See "Incomplete month options."



Period Tables

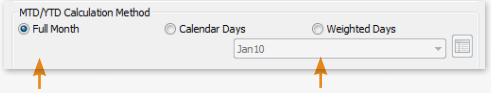
To use a period table, choose from the drop down shown here in the date dialogue box.

3. Context: Select any subgroupings of business segments
*Optionally apply any filters. See the page called "Choose the Context"



Incomplete month options

Select an option for incomplete months:
View > Modifiers > MTD/YTD Calculation Method

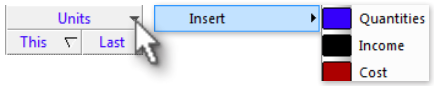


Incomplete month vs complete month last year—"gap" or "goal" perspective

Compares same number of days this year and last —most precise "gain/loss" vs last

4. Metrics: Insert and / or delete

Insert



Hover on any column heading then right click, or click on the arrow that appears on hover and choose "Insert" to add metrics.

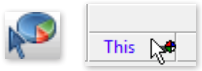
Budget/forecast: same as Inserting metrics above

5. Add variance, mix, budgets:

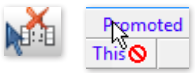
Activate the pointer tool shown by clicking once on the icon and then on the heading to perform the math. Then, click the same icon to deselect.

% Change and Difference

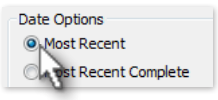
Percent of total (mix)
Same steps as above to activate pointer



Delete
Click the "delete" cursor tool button once to activate then click on either headings or subheadings to remove columns.



6. Save bookmark:
Bookmarks > Add Bookmark
Select Most Recent to automatically update



For YTD

YTD vs YAG
Use the same steps listed on the left except:

- Check the YTD box when selecting the time frame
- For fiscal YTD or YTD using your period table, choose the option to the right, below.

Date Comparison Notes:

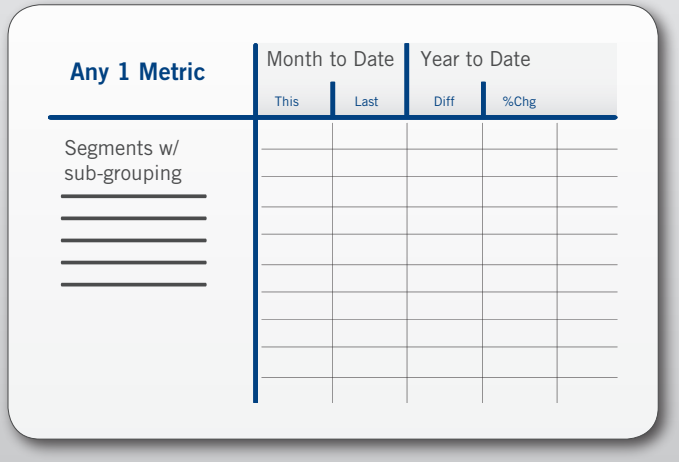
Our suggested method provides the most automated way to update MTD/YTD bookmarks over time. If you require a comparison of exactly the same number of "days with sales," other options are available such as:

- Add a "count" field to identify the number of days with sales for each period to see if there was one or two more business days this month compared to YAG.
- The date dialog box provides a "days" resolution that lets you pick any start and end date with an Advanced time comparison; however, it must be updated each time you view the bookmark.

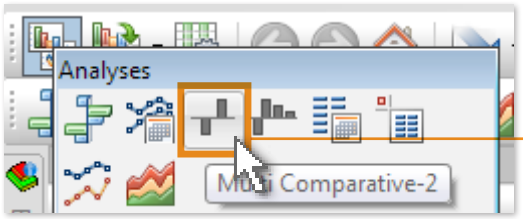
Bookmark Building 101 Segmentation and Measurement Basics

MTD and YTD vs YAG
(1 Metric)

Identify gains & losses for both MTD and YTD comparing one measure and any business segment sub-grouping.



1. Analysis: Choose the Multi Comparative-2

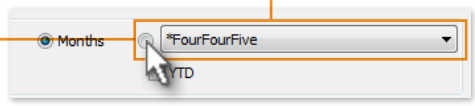


Select the Numbers View

If this button is greyed out you may need to turn off multi-analysis by clicking this icon

Period Tables

To use a period table, choose from the drop down shown here in the date dialogue box.

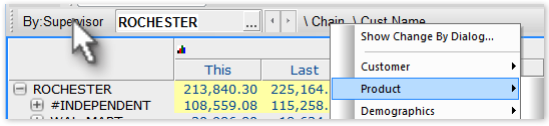


2. Time frame: Select most recent month

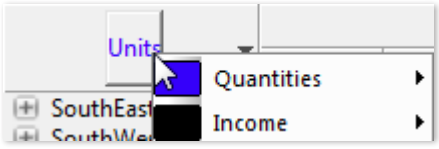
Select an option for incomplete months:
See "Incomplete month options."

3. Context: Select any subgroupings of business segments

*Optionally apply any filters. See the section called "Choose the Context"



4. Select Metric: Click upper-left box

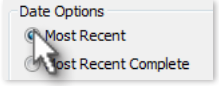


5. Variance, Mix, Budgets:

This preset does not support mix or budgets. All columns are "pre-set" for ease of use. See the next lesson to customize columns.

6. Save Bookmark:

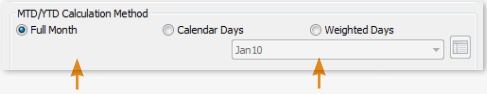
Bookmarks > Add Bookmark
Select Most Recent



If you choose "Most Recent Complete", the numbers will be based on Last Month End.

Incomplete month options

Select an option for incomplete months:
View > Modifiers > MTD/YTD Calculation Method



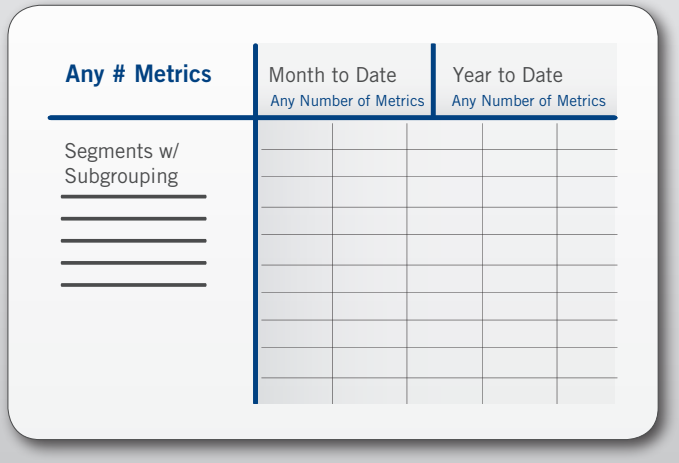
Incomplete month vs complete month last year—"gap" or "goal" perspective

Compares same number of days this year and last —most precise "gain/loss" vs last

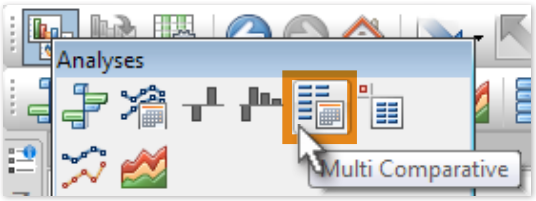
Bookmark Building 101 Segmentation and Measurement Basics

MTD and YTD vs YAG
(Multiple Metrics)

Identify Gains & losses for both MTD and YTD comparing multiple metrics and any business segment sub-grouping.

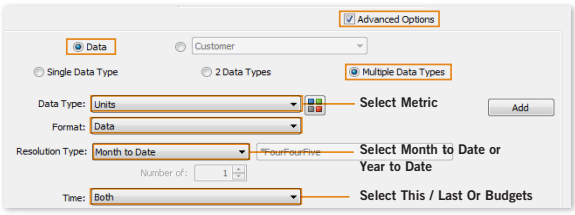


1. Analysis:
Analyses > Multi Comparative

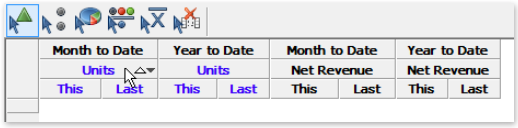


2. Configure Time frame by Metric:
In Multi Comparative Setup, click Setup. Click New.

Select options as shown. Click Add to add columns
Repeat for additional metrics, YTD and budgets.

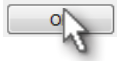


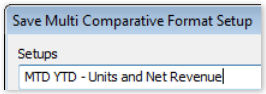
3. Variance, Mix, Budgets
Repeat for additional metrics, YTD, and budgets.
In preview pane, use pointer tools to add delta and/ or mix.



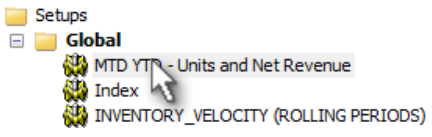
In Preview pane, click and drag to move columns.

Save setup.

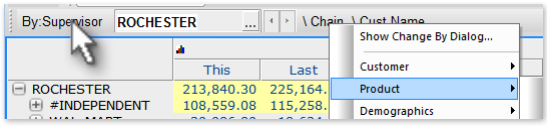




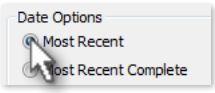
Apply Setup.



4. Context: Select any subgroupings of business segments
*Optionally apply any filters. See the section called "Choose the Context"

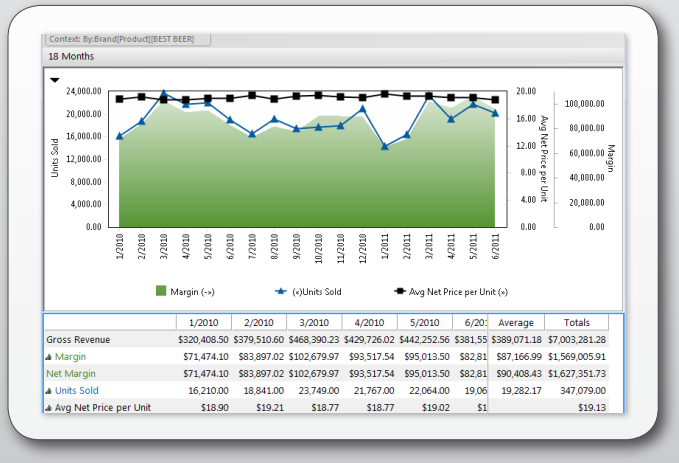


5. Save bookmark:
Bookmarks > Add Bookmark
Select Most Recent

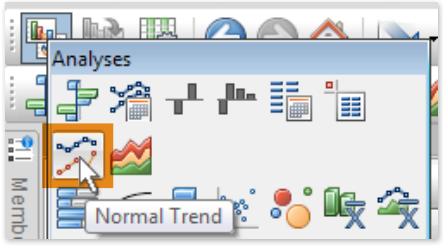


Tracking Performance Over Time, Trend Analysis

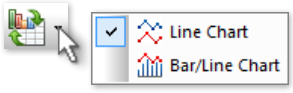
Trend any item with multiple metrics



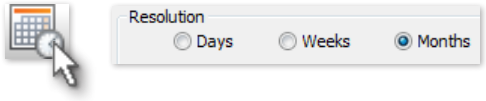
1. Analysis:
Analysis > Normal Trend



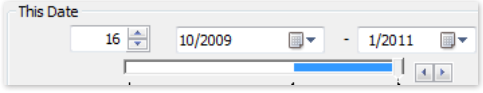
Select line graph.



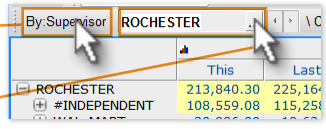
2. Time frame: Select units of time.



Select how many and when.

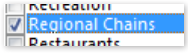


3. Context:
Select segments.
Select focus.



The Normal Trend shows data for the item in focus. Options include:

- Single item

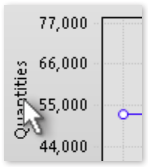


- Total or average of all items

*Optionally, apply any filters.

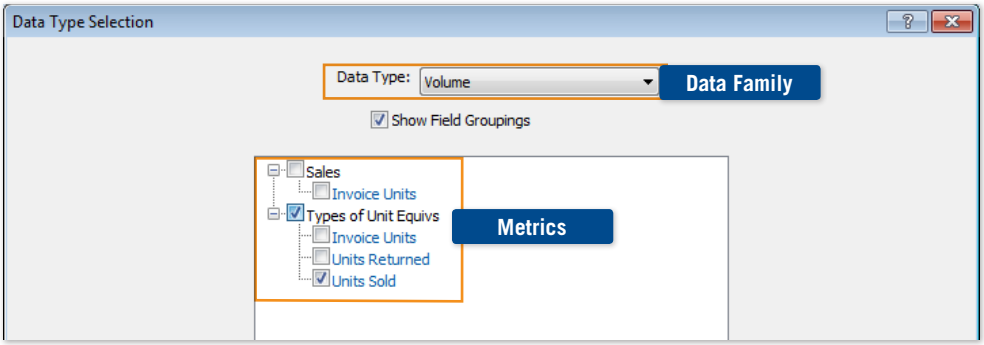
4. Metrics:

Click axis label to open dialog.



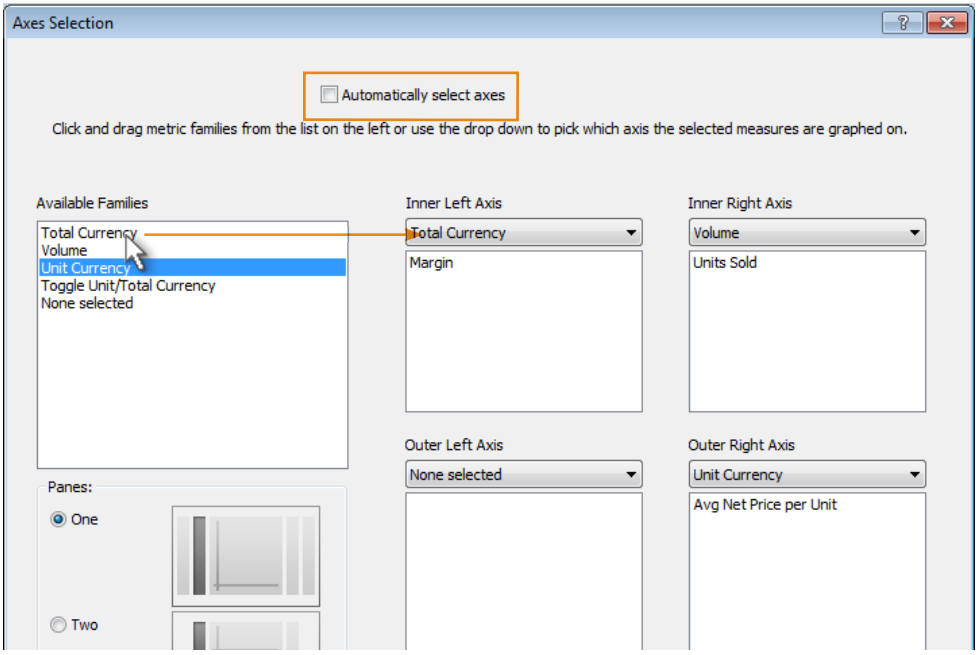
In the Data Type Selection dialog, select the metrics that you'd like to display. (In the next dialog, you will be able to assign metrics to axes.)

- Select the data family (e.g., volume, total currency, etc.) of the metric(s).
- Check the boxes of the metrics.
- Repeat until you have checked the boxes of all metrics to display.
- Click **Next** when you are finished selecing metrics.



In the Axes Selection dialog, select "where" you want to graph each family of data.

- Clear the "Automatically select axes" box.
- Drag and drop the available data families to the desired axis. Only metrics and associated families that you selected in the previous dialog are available.

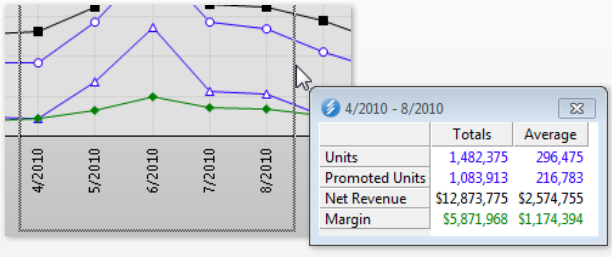


5. Save bookmark:

Bookmarks > Add Bookmark
Select Most Recent or Most Recent Complete option to update automatically.

Additional Concept: "Rubberbanding" dates

To see details for any subset of the date range, RIGHT-CLICK and drag (available in any time-series).

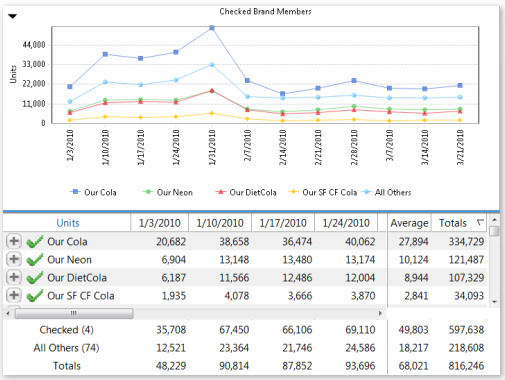


Tracking Performance Over Time, Trend Analysis

Trend multiple items

Identify performance trends for all members within any business segment.

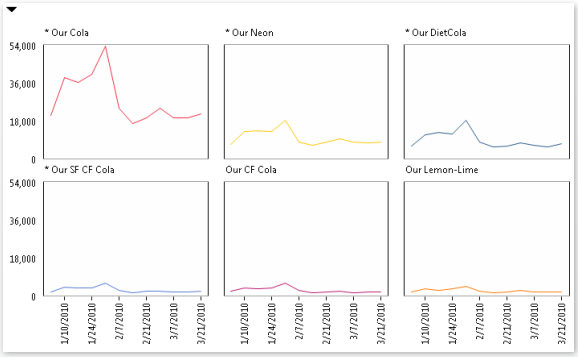
- Comparison trend



Units	1/3/2010	1/10/2010	1/17/2010	1/24/2010	Average	Totals
Our Cola	20,682	38,658	36,474	40,062	27,894	334,729
Our Neon	6,904	13,148	13,480	13,174	10,124	121,487
Our DietCola	6,187	11,566	12,486	12,004	8,944	107,329
Our SF CF Cola	1,935	4,078	3,666	3,870	2,841	34,093
Checked (4)	35,708	67,450	66,106	69,110	49,803	597,638
All Others (74)	12,521	23,364	21,746	24,586	18,217	218,608
Totals	48,229	90,814	87,852	93,696	68,021	816,246

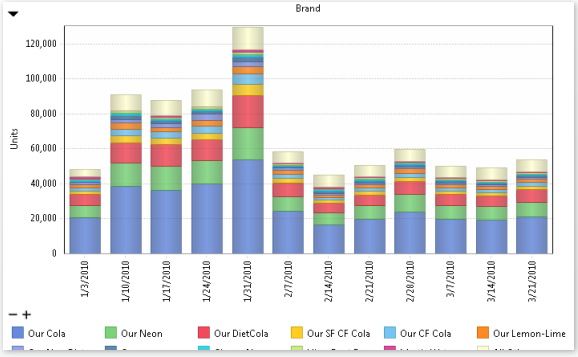
Line Chart Format

-Trellis view trends for comparison



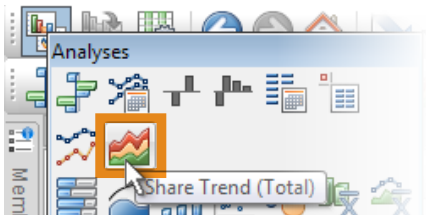
Trellis Format

- Trend of individual segments "stacked" to show totals over time

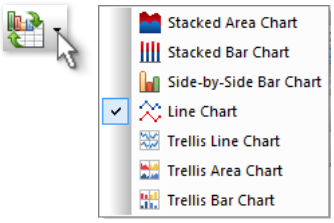


Stacked Bar

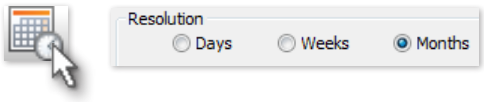
1. Analysis:
Analysis > Share Trend (Total)



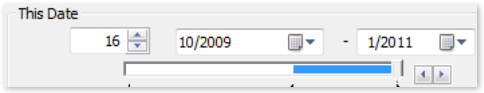
Select graph format (see examples on the left).



2. Time frame: Select units of time.



Select how many and when.



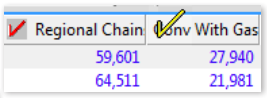
3. Context:
Select segments.

* Optionally, apply any filters.

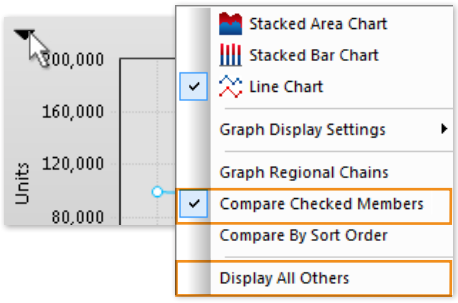
– Switch to numbers.

– Checkmark items.

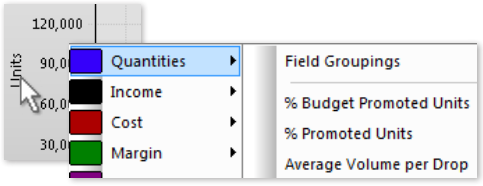
– Switch back to graph.



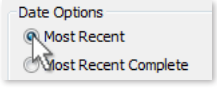
In the graph:
– Click arrow to open menu.
– Select "Compare Checked Members"
– Uncheck "Display All Others"



4. Metrics:
Click axis label and select.



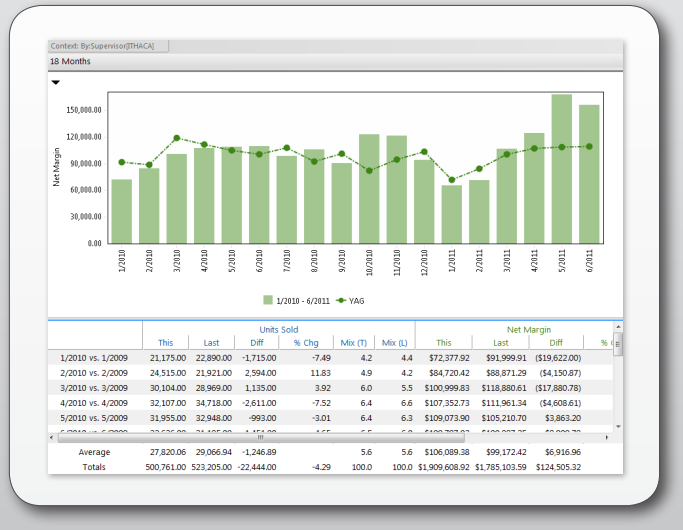
5. Save bookmark:
Bookmarks > Add Bookmark
Select Most Recent or Most Recent Complete option to update automatically.



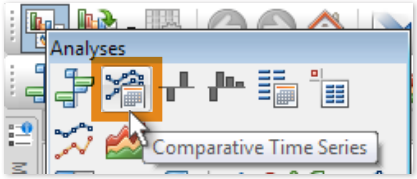
Tracking Performance Over Time, Trend Analysis

Rolling 12-month vs. YAG bar/line chart

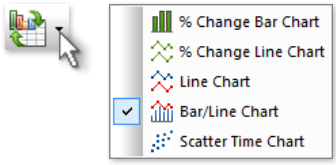
Identify peaks or dips in performance compared to the prior year.



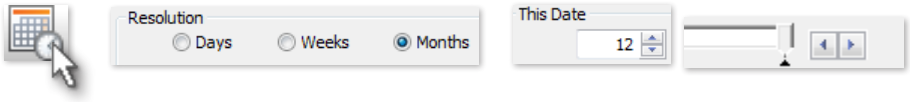
1. Analysis:
Analysis > Comparative Time Series



Select from the available chart types



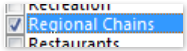
2. Time frame: Select most recent 12 months (or similar if using custom periods).



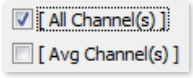
3. Context: Select any subgroupings of business segments
*Optionally apply any filters. See the page called "Choose the Context"

The Comparative Time Series shows data for the item in focus. Options include:

– Single item

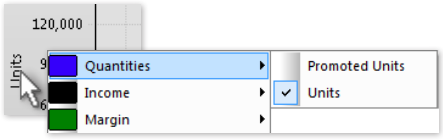


– Total or average of all items



*Optionally, apply any filters.

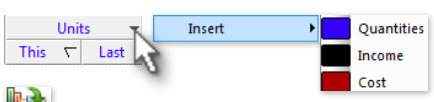
4. Metrics:
Click axis label and select.



If the metric is not listed:

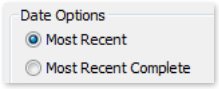
– Switch to numbers.

– Insert metrics



– Switch back to graph and retry.

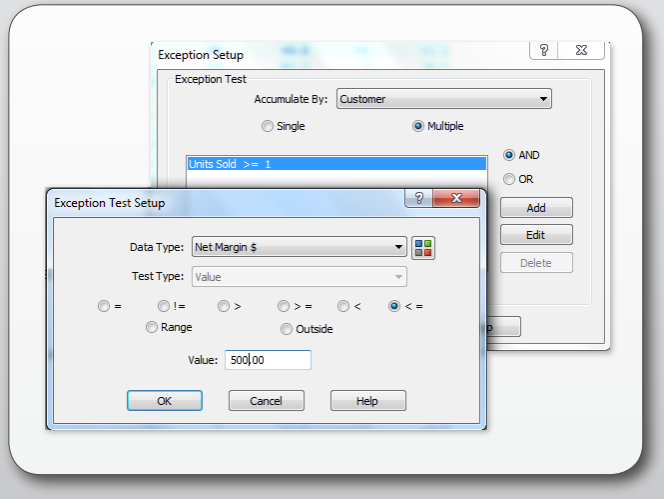
5. Save bookmark:
Bookmarks > Add Bookmark
Select Most Recent or Most Recent Complete option to update automatically.



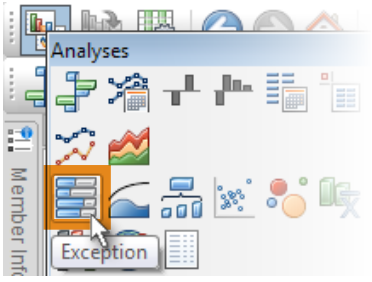
Exception Analysis

User-Defined Exceptions

Set any performance-based criteria such as:
% Distribution by Brand, Channel, Rep, etc. *who did and did not buy within any business segments.*

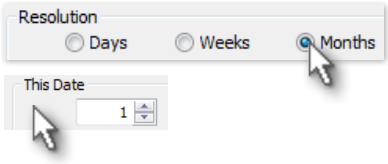


1. **Analysis:** choose the Exception.

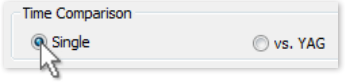


Use the Numbers/Graph Toggle if you are not already in a grid view

2. **Time frame:**
Select most recent week, MTD, YTD, or any other time frame.

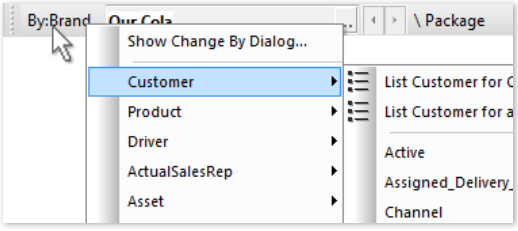


Select time comparison.



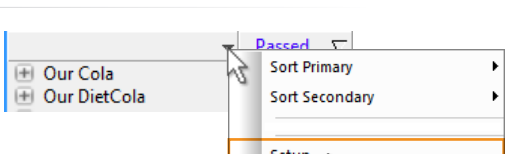
3. **Context:**
Select any subgroupings of business segments

*Optionally apply any filters.

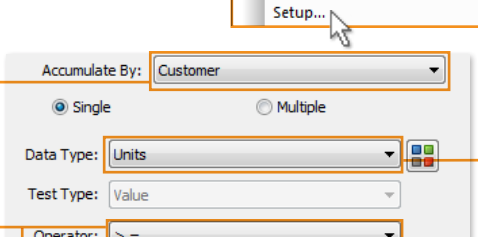


4. Test setup:

Place cursor over upper left box and click arrow to select Setup from the Options menu, or access these options using the Exception Setup dialog (Analyses > Exception > Dimension Members).



Select what to test and count.



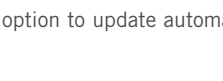
Select the test metric.

Select test criteria.

5. Save bookmark:

Bookmarks > Add Bookmark

Select Most Recent or Most Recent Complete option to update automatically.

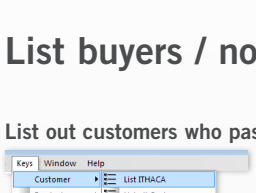


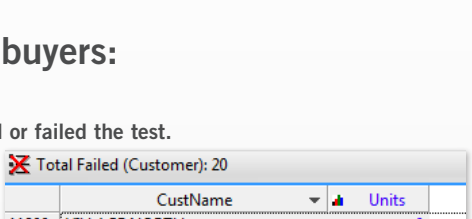
Automated exceptions:
(e.g. list of non-buyers)

Automated exceptions (i.e., automatically updated lists of buyers/non-buyers or pass/fail for any other performance criteria) can be achieved using the "Of These" feature. See page 49.

List buyers / non-buyers:

List out customers who passed or failed the test.





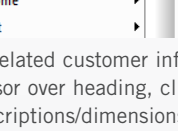
	CustName	Units
11900	VILLAGE NORTH	0
11903	VILLAGE NORTH # 27	0
11906	VILLAGE NORTH # COC/07	0
11909	VILLAGE NORTH # PF/17	0
11911	VILLAGE NORTH # SS/17	0
70222	OBECK INC #FS	0
70236	OBECK INC # 931D	0

Tip: To insert related customer information: Place your cursor over heading, click arrow, and select descriptions/dimensions.

	Totals	Passed	% Passed	Failed
Industrial	578	222	38.4	356
Schools	458	204	44.5	254
Recreation	443	130	29.3	313
Restaurants	411	182	44.3	229

To List: In grid, DOUBLE-RIGHT-CLICK under passed or failed column.

In bar graph, DOUBLE-RIGHT-CLICK colored (passed) or gray (failed) section of bar.

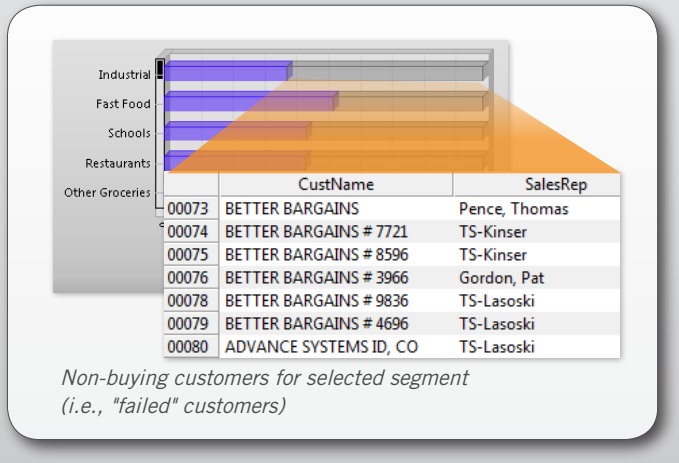


In time-series graph, DOUBLE-RIGHT-CLICK colored (passed) or gray (failed) area above desired date.

Exception Analysis

Distribution Gap Analysis

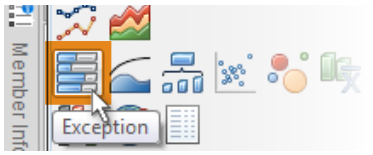
Identify "gap" in distribution by listing out products or customers who passed or failed a test based on your criteria.



	CustName	SalesRep
00073	BETTER BARGAINS	Pence, Thomas
00074	BETTER BARGAINS # 7721	TS-Kinser
00075	BETTER BARGAINS # 8596	TS-Kinser
00076	BETTER BARGAINS # 3966	Gordon, Pat
00078	BETTER BARGAINS # 9836	TS-Lasoski
00079	BETTER BARGAINS # 4696	TS-Lasoski
00080	ADVANCE SYSTEMS ID, CO	TS-Lasoski

Non-buying customers for selected segment (i.e., "failed" customers)

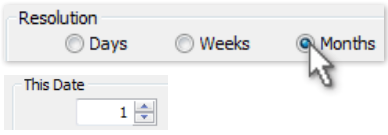
1. Analysis: choose the Exception.



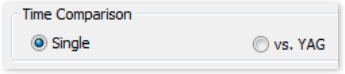
Use the Numbers/Graph Toggle if you are not already in a grid view

	Passed	% Passed	Failed	% Failed
Our Cola	2,064	35.3	3,777	64.7
Our DietCola	1,740	29.8	4,101	70.2
Our Neon	1,428	24.4	4,413	75.6
Our Lemon-Lime	1,350	23.1	4,491	76.9
Hires Root Beer	939	16.1	4,902	83.9
Orange	655	11.2	5,186	88.8
Our SF CF Cola	630	10.8	5,211	89.2
Ginger Ale	628	10.8	5,213	89.2
Average	176	3.0	5,665	97.0

2. Time frame:
Select most recent week, MTD, YTD, or any other time frame.

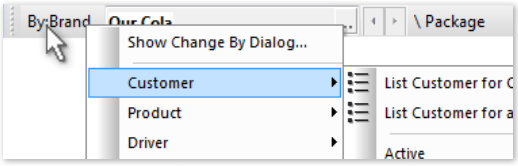


Select time comparison.



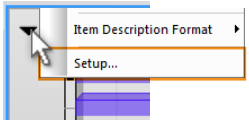
3. Context:
Select any subgroupings of business segments

*Optionally apply any filters.



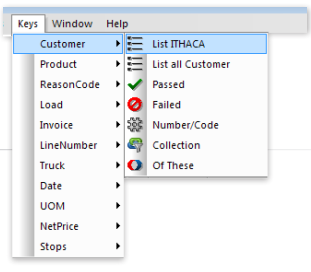
4. Test Setup: Click arrow in upper-left corner and select Setup.

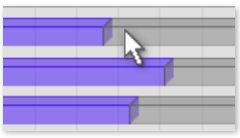
Select test settings in dialog
(See Step 4 of User Defined Exceptions, Page 25).



5. List Customers: DOUBLE-RIGHT-CLICK on the gray area to list failing customers within any segment; DOUBLE-RIGHT-CLICK on the colored area to list passing customers.

or choose from the "Keys" menu



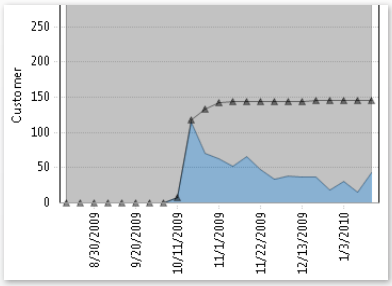


6. Save bookmark

Exception Analysis

New Product Intro / Penetration Over Time

Trend number of customers who pass and fail (i.e. buyers and non-buyers) over time. Identify product life-cycle, rate of introduction, market reaction to new products and customized penetration test results based on your own criteria.

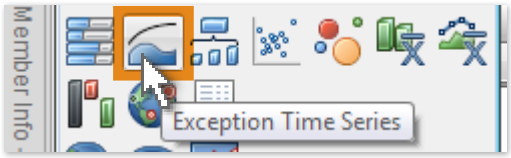


Gray area - failing customers (i.e. non-buyers)

Cumulative line - passed at least once since beginning date

Colored area - passing customers (i.e. buyers)

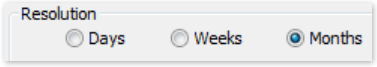
1. Analysis: Choose the Exception Time Series.



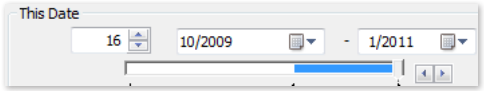
Use the Numbers/Grid toggle to switch to graph view.

2. Time frame:

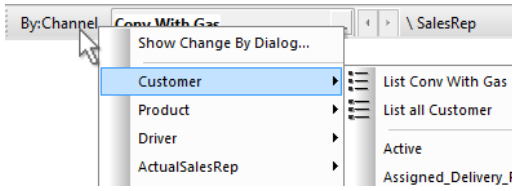
Select units of time.



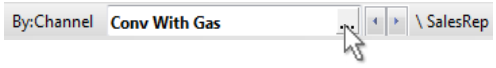
Select how many and when.



3. Context: Select segments.

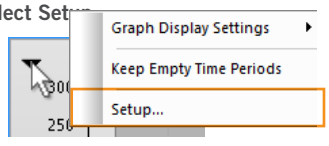


Select focus.



4. Test setup: Click arrow in upper-left corner and select Setup...

Select test settings in dialog (same as previous).



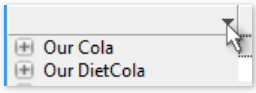
5. Save bookmark:

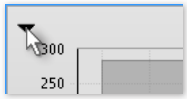
Bookmarks > Add Bookmark

Select Most Recent

Advanced test criteria:

Previous examples use the basic test of customers with Sales Units greater than or equal to 1. Easily customize the test.



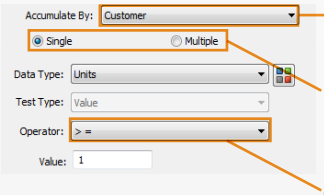


Open setup:

In grid, place cursor over upper-left box and click arrow.

In graph, click arrow in upper-left corner.

Select Setup.

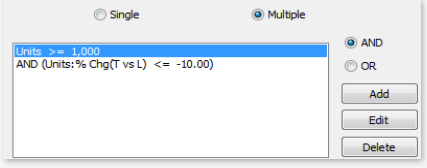


What to test (e.g. customers or products)

Set single or multiple criteria.

Options include >=, <=, =, not equal to (!=), inside range, etc.

Multiple criteria:

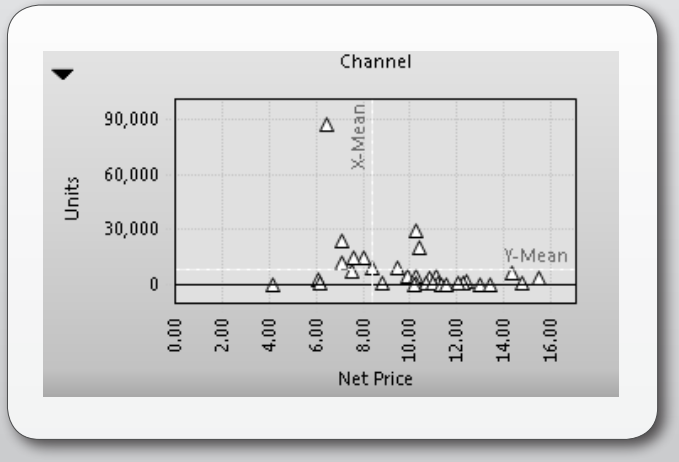


Define multiple criteria that customers, products, etc., must pass. Specify that they must pass all criteria (AND) or at least one (OR).

Scattergram Analysis

Scattergram Analysis

Determine outliers at a summary business segment level (channels, sales representatives, brands, etc.)



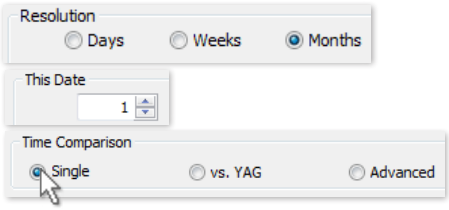
1. Analysis:
Analysis > Bubble

Select graph format

2. Time frame:

Select most recent week, MTD, YTD, or any other time frame.

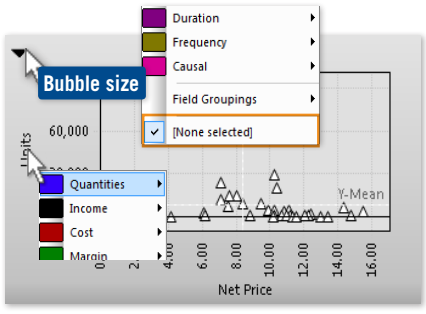
Select single comparison.



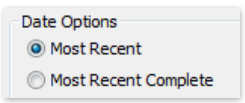
3. Context:
Select segments.

*Optionally, apply any filters. See the context section in "Getting Started".

4. Metric:
Click label and select:
Bubble size—Choose [None Selected]
x axis & y axis - Choose any metric

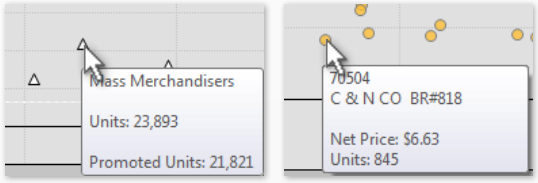


5. Save bookmark:
Bookmarks > Add Bookmark
Select Most Recent or Most Recent Complete option to update automatically.



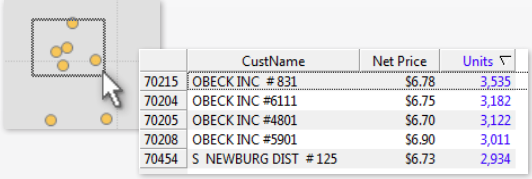
Learn more:

Identify:
Mouseover any point to see its name and values.



Rubberband and list:
RIGHT-CLICK and drag to select and list out any points.

*At the business segment level, this lists out underlying details (customers, SKUs, etc.)



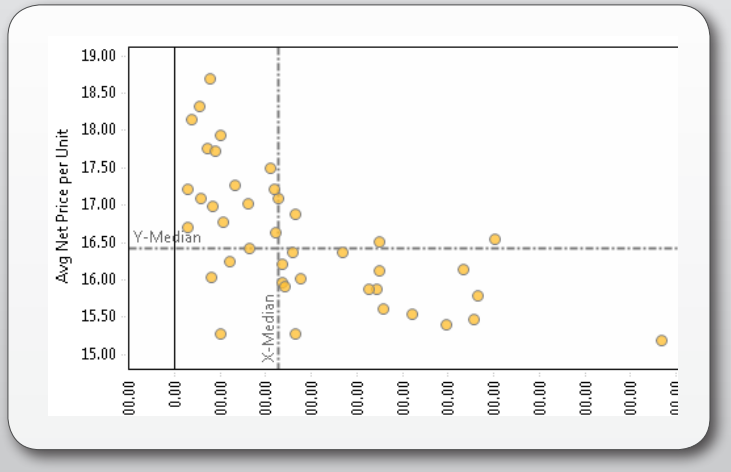
	CustName	Net Price	Units
70215	OBECK INC #831	$6.78	3,535
70204	OBECK INC #6111	$6.75	3,182
70205	OBECK INC #4801	$6.70	3,122
70208	OBECK INC #5901	$6.90	3,011
70454	S NEWBURG DIST #125	$6.73	2,934

Zoom:
Click and drag to zoom in.

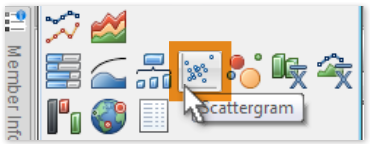
Scattergram Analysis

Simple Scattergram

Determine outliers at the lowest level of detail (SKU, customer, etc.)



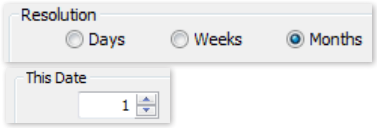
1. Analysis:
Analysis > Scattergram



Select graph format

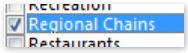
2. Time frame:

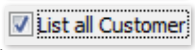
Select most recent week, MTD, YTD, or any other time frame.



3. Context:
Select segments.

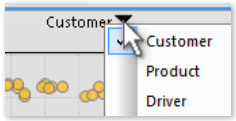
Select focus.

The Scattergram shows data for the focus only.
Options include:
—Single member 

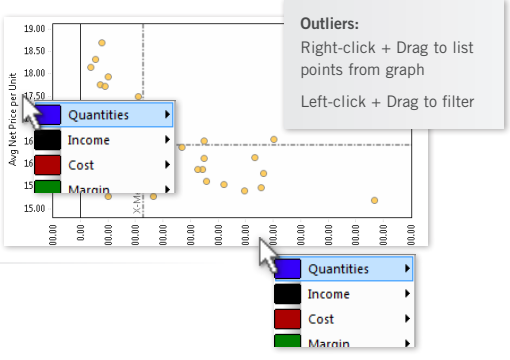
—All members 

* Optionally, apply any filters.

4. What to graph:
Click label above graph and make selection.



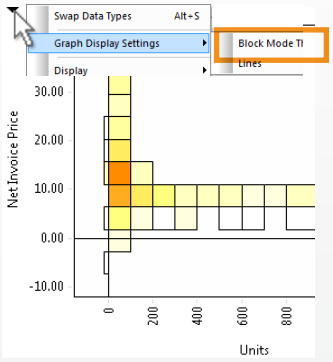
5. Metrics:
Click each axis label and select metric.



6. Save bookmark:
(see previous)

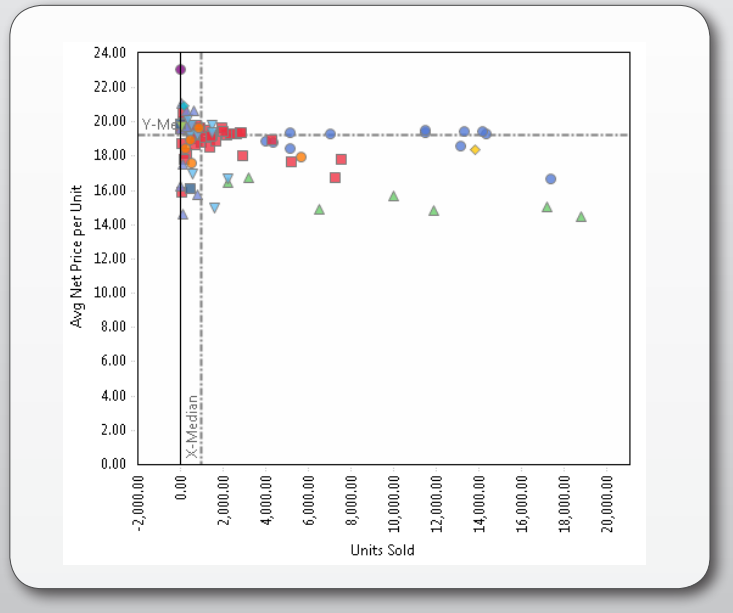
Block mode:

If the Scattergram has many points, the graph can group the points together into "blocks" to improve performance and show where points are clustered together.

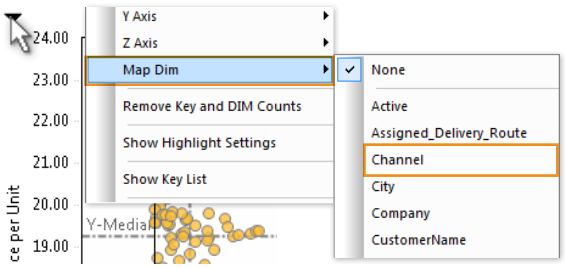


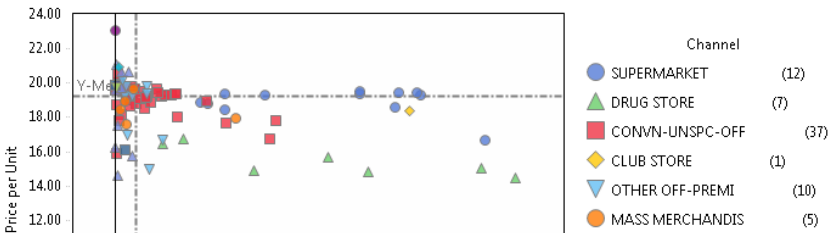
Enhanced Scattergram

"Color and shape" by secondary segment or third metric for added intelligence

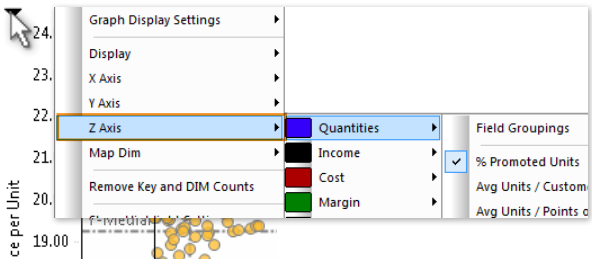


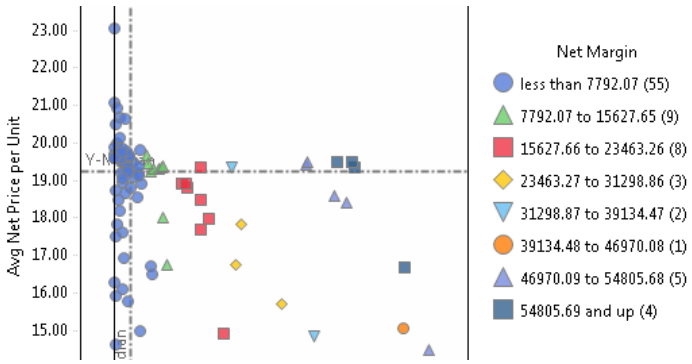
Same as simple Scattergram plus:
For a secondary segment (e.g., Channel), click arrow in upper-left corner and select the Map Dim option and then the desired business segment.





For a third metric, select a Z axis option.





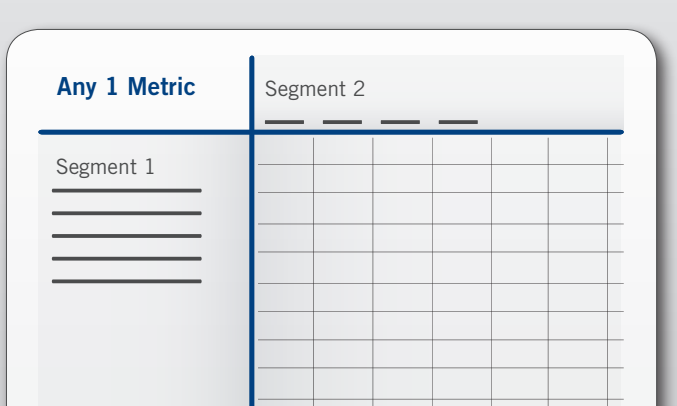
Crosstab analysis, matrix any two business segments

Crosstab

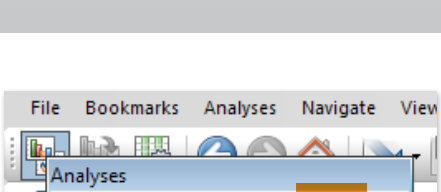
Identify performance for any metric within any two business segments

Example:

- Brand sales by Sales Rep
- Supplier sales by Region
- Chain Account sales by Product Category
- Customer list by related group of SKU's



1. Analysis:
Analysis > Crosstab

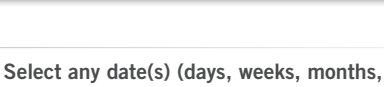


Use the Numbers/Grid toggle if you are not already in grid view.

2. Time frame:

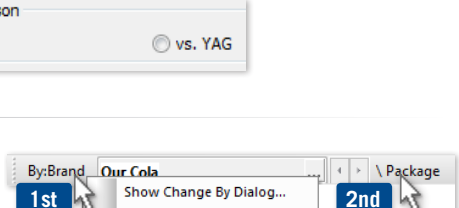
Select any date(s) (days, weeks, months, YTD, etc.).

Select a Single comparison.

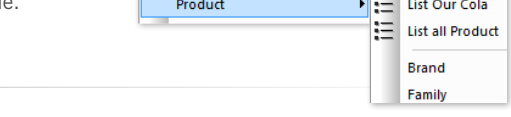


3. Context:
Select two related business segments.

*Optionally, apply any filters.
See the SIM Getting Started Guide.

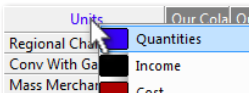


4. Metrics
Click metric in upper-left box and select from menu.



5. Save bookmark:
Bookmarks > Add Bookmark

Select Most Recent or Most Recent Complete option to update automatically.

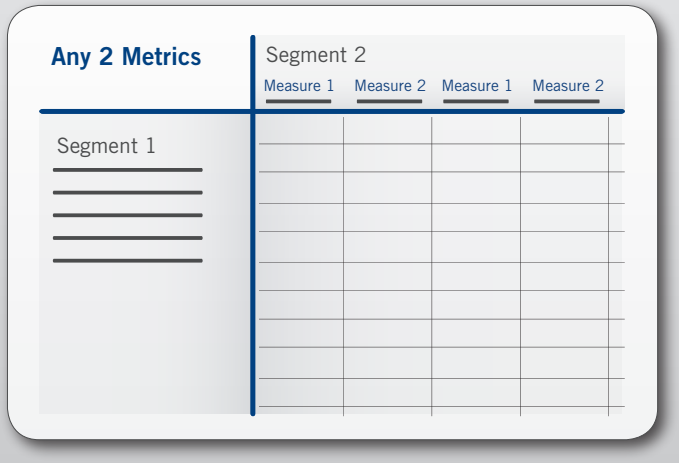


Crosstab analysis, matrix any two business segments

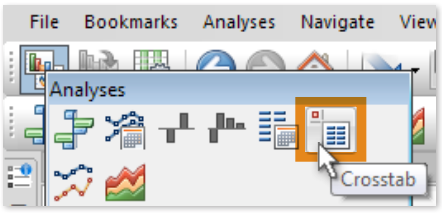
Crosstab

Identify performance for any two metrics within any two business segments

Note: for sub-grouping and more advanced comparison; consider the same intelligence that the "Comparative Dim Member" analysis provides



1. Analysis:
Analysis > Crosstab

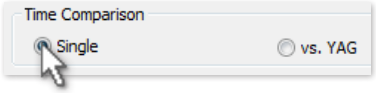


Use the Numbers/Grid toggle if you are not already in grid view.

2. Time frame:

Select any date(s) (days, weeks, months, YTD, etc.).

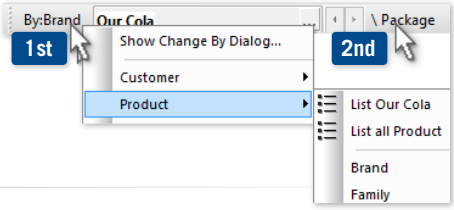
Select a Single comparison.



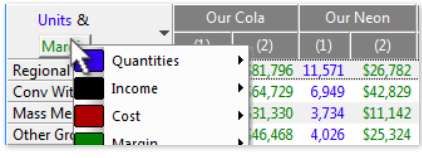
* Comparison must be Single

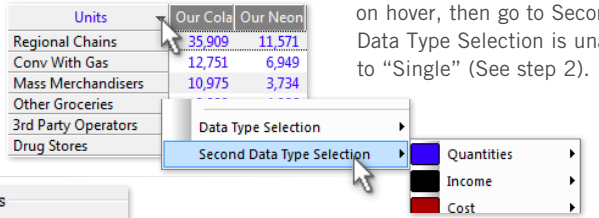
3. Context:
Select two related business segments.

*Optionally, apply any filters.
See the SIM Getting Started Guide.



4. Metrics
Click each metric in upper-left box and select from menu.

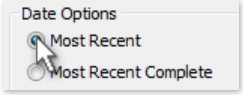




*If only one metric is present in box, click the arrow shown on hover, then go to Second Data Type Selection. If Second Data Type Selection is unavailable, change the time frame to "Single" (See step 2).

5. Save bookmark:
Bookmarks > Add Bookmark

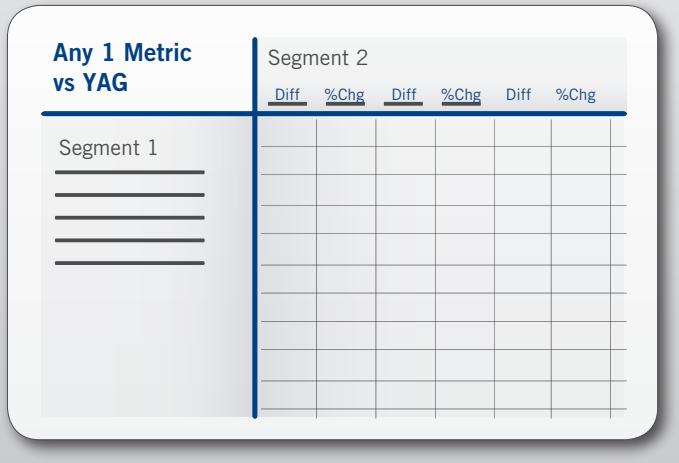
Select Most Recent or Most Recent Complete option to update automatically.



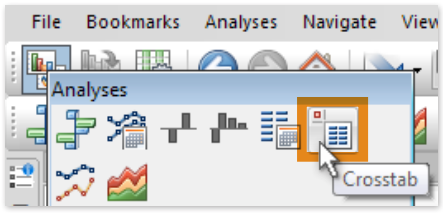
Crosstab analysis, matrix any two business segments

Crosstab
Variance vs. YAG

Identify gains & losses vs year ago for any metric within any two segments.



1. Analysis:
Analysis > Crosstab

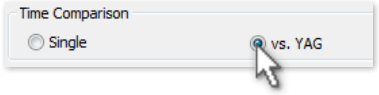


Use the Numbers/Grid toggle if you are not already in grid view.

2. Time frame:

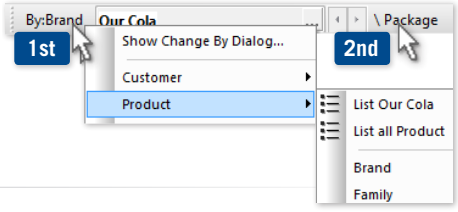
Select any date(s) (days, weeks, months, YTD, etc.).

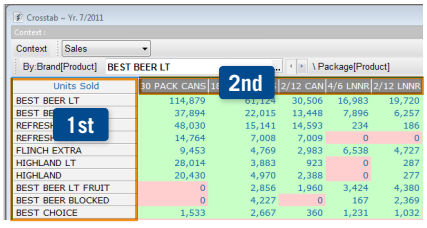
Select a YAG comparison.



3. Context:
Select two related business segments.

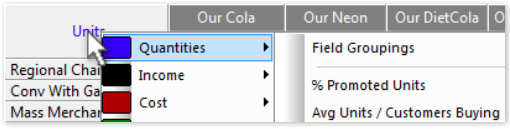
*Optionally, apply any filters.
See the SIM Getting Started Guide.



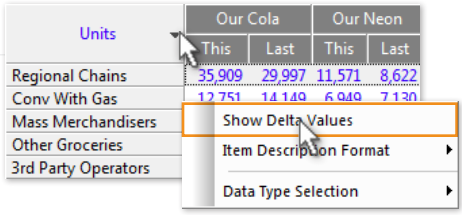


4. Metrics
Click metric in upper-left box and select from menu.

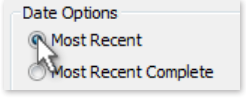
*If two metrics are present in box, click second metric and choose None Selected to accomplish this view.



5. Variance:
Click arrow in upper-left box and select Show Delta Values.



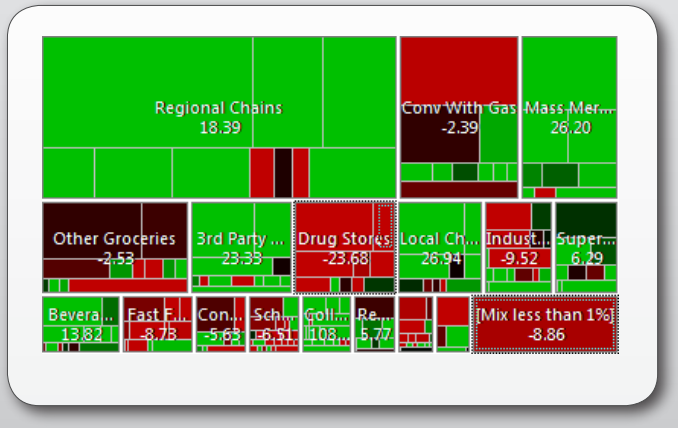
6. Save bookmark:
Bookmarks > Add Bookmark
Select Most Recent or Most Recent Complete option to update automatically.



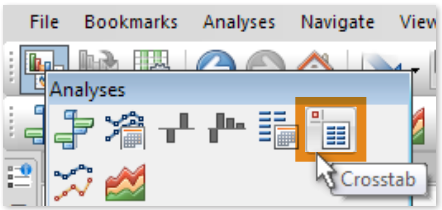
Crosstab analysis, matrix any two business segments

Deltamap

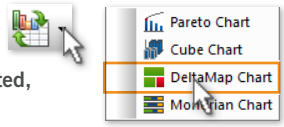
Visually identify gains & losses vs year ago for any metric within any two segments. Also compare share for each area to focus on what's important.



1. Analysis:
Analysis > Crosstab



Select Deltamap.



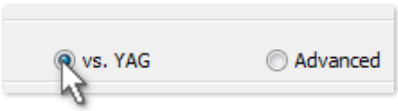
If Deltamap is not listed, you may need to:

- Select YAG or Advanced comparison (see below).
- Select a different metric (one that can be divided logically).

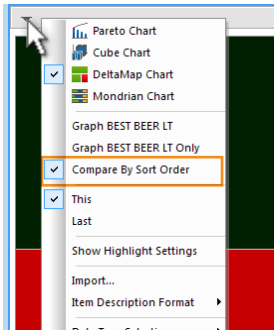
2. Time frame:

Select any date(s) (days, weeks, months, YTD, etc.).

Select another period to compare against (YAG or Advanced).



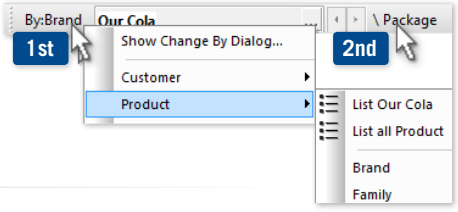
Choose "Compare By Sort Order" from the Chart Options



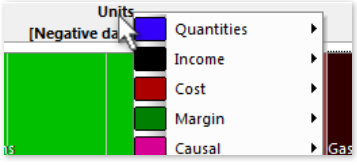
3. Context:
Select two related business segments.

- **1st:** major blocks (e.g. brands)
- **2nd:** subsections (e.g. packages within each brand)

*Optionally, apply any filters.

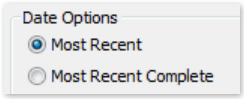


4. Metrics
Click metric at top of Deltamap.



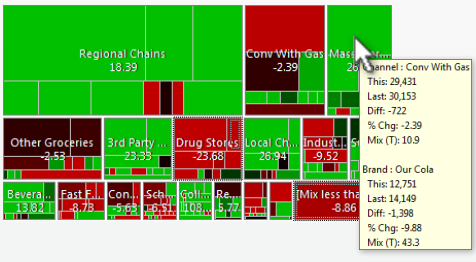
5. Save bookmark:
Bookmarks > Add Bookmark

Select Most Recent or Most Recent Complete option to update automatically.



About the Deltamap:

Large green blocks show the biggest positive changes; large red blocks show the biggest negative changes.

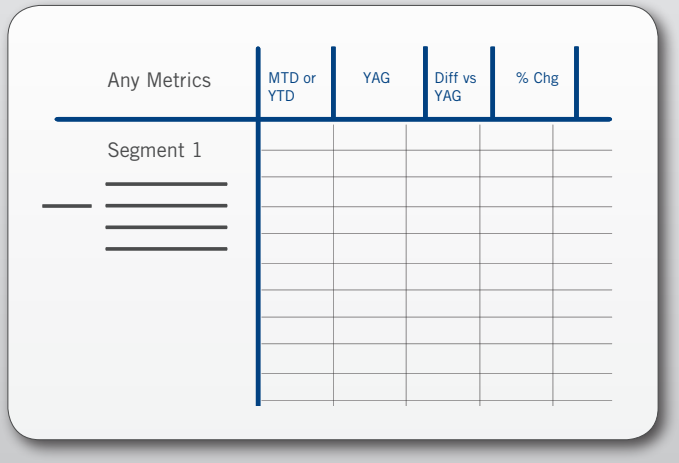


Place your cursor over any block to see what it represents and the underlying numbers.

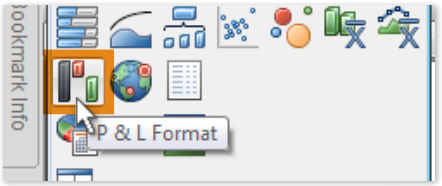
Profit and Loss Analysis

P&L format for a business segment

List many metrics vertically, for a consolidated scorecard for any segment.



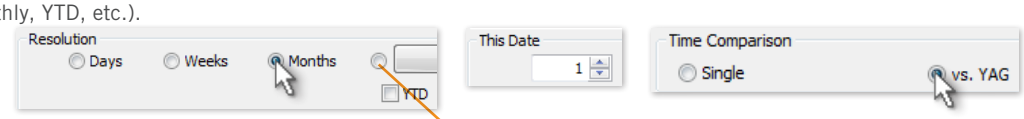
1. Analysis:
Analysis > P&L Format



Use the Numbers/Grid toggle if you are not already in grid view.

2. Time frame: Select date range (weekly, monthly, YTD, etc.).
* Also see "MTD/YTD option."

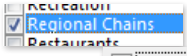
Select YAG.

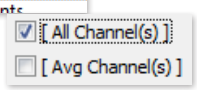


3. Context:
Select segments.

Select focus.

The P&L shows data for the item in focus. Options include:

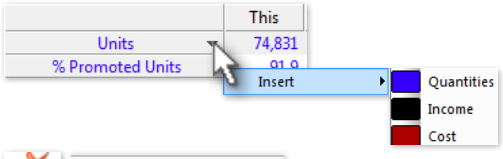
- Single item 

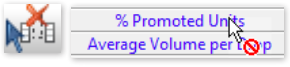
- Total or average of all 

Period Tables

To use a period table, choose from the drop down shown here in the date dialogue box.

4. Metrics: Insert and / or delete

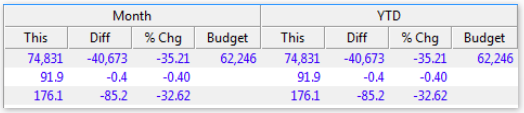
Insert 

Delete 

Consolidated MTD/YTD

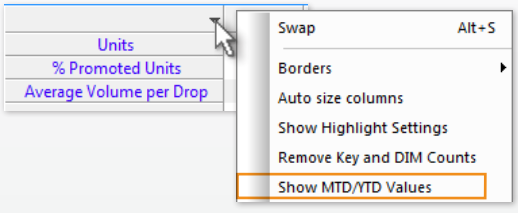
switches the time frame to show:

MTD and YTD with the selected columns under each heading.



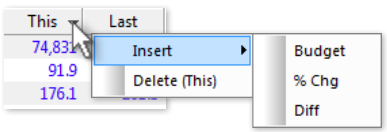
	Month				YTD			
This	Diff	% Chg	Budget	This	Diff	% Chg	Budget
74,831	-40,673	-35.21	62,246	74,831	-40,673	-35.21	62,246
91.9	-0.4	-0.40		91.9	-0.4	-0.40	
176.1	-85.2	-32.62		176.1	-85.2	-32.62	

Click the arrow shown on over in the upper-left corner to select this option.



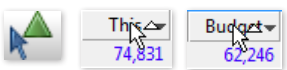
5. Columns: (This, Last Diff, % Change, Budget, etc.)

Click arrow in column heading or right-click and choose Insert.



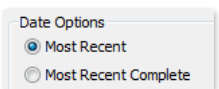
Use the Delta Pointer Cursor Tool to add **Diff/% Change vs Budgets**

Click once to activate then click the field headings based on the logical "order of operations."

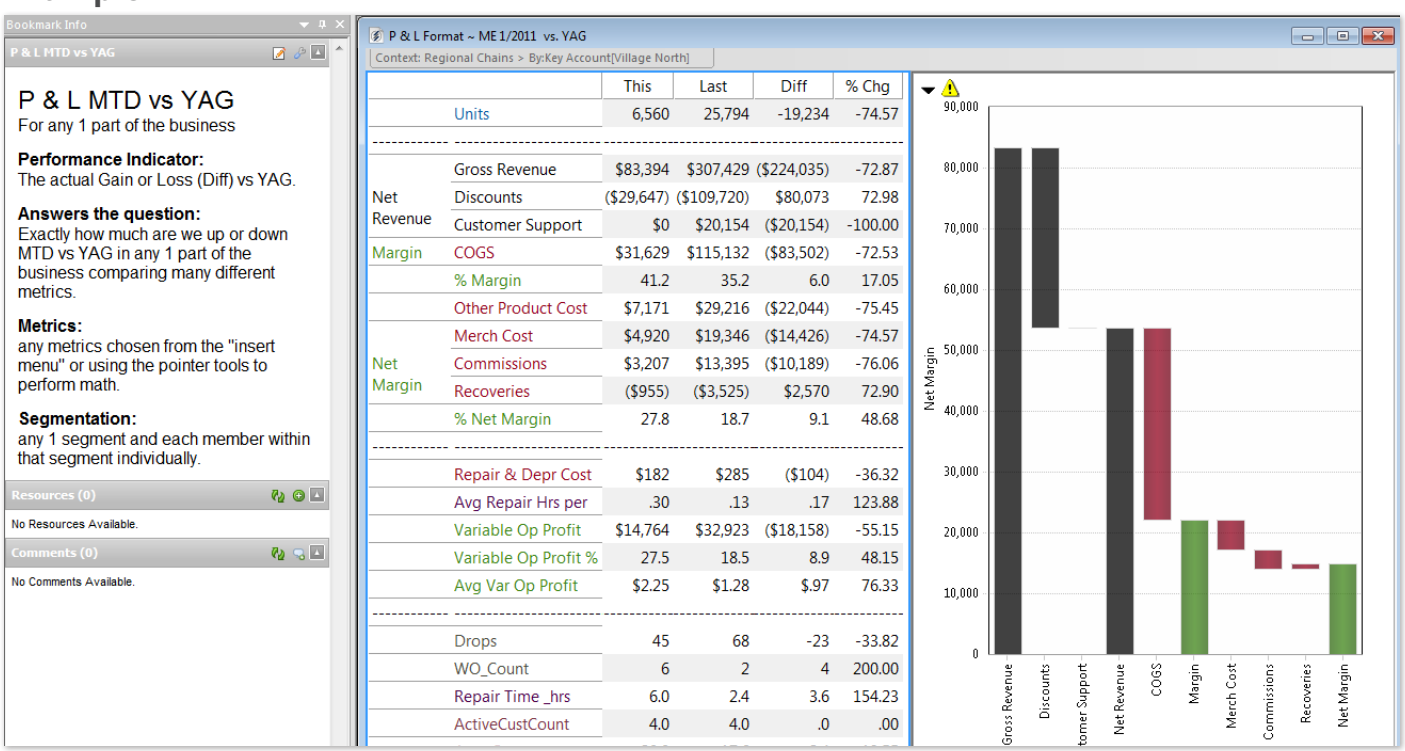


6. Save bookmark:

Bookmarks > Add Bookmark
Select Most Recent or Most Recent Complete option to update automatically.



Example


Bookmark Info
P & L MTD vs YAG
P & L MTD vs YAG
For any 1 part of the business
Performance Indicator:
The actual Gain or Loss (Diff) vs YAG.
Answers the question:
Exactly how much are we up or down MTD vs YAG in any 1 part of the business comparing many different metrics.
Metrics:
any metrics chosen from the "insert menu" or using the pointer tools to perform math.
Segmentation:
any 1 segment and each member within that segment individually.
Resources (0)
No Resources Available.
Comments (0)
No Comments Available.
P & L Format ~ ME 1/2011 vs. YAG
Context: Regional Chains > By:Key Account[Village North]
This
Last
Diff
% Chg
Units 6,560 25,794 -19,234 -74.57
Net Revenue
Gross Revenue $83,394 $307,429 ($224,035) -72.87
Discounts ($29,647) ($109,720) $80,073 72.98
Customer Support $0 $20,154 ($20,154) -100.00
Margin
COGS $31,629 $115,132 ($83,502) -72.53
% Margin 41.2 35.2 6.0 17.05
Other Product Cost $7,171 $29,216 ($22,044) -75.45
Net Margin
Merch Cost $4,920 $19,346 ($14,426) -74.57
Commissions $3,207 $13,395 ($10,189) -76.06
Recoveries ($955) ($3,525) $2,570 72.90
% Net Margin 27.8 18.7 9.1 48.68
Repair & Depr Cost $182 $285 ($104) -36.32
Avg Repair Hrs per .30 .13 .17 123.88
Variable Op Profit $14,764 $32,923 ($18,158) -55.15
Variable Op Profit % 27.5 18.5 8.9 48.15
Avg Var Op Profit $2.25 $1.28 $.97 76.33
Drops 45 68 -23 -33.82
WO_Count 6 2 4 200.00
Repair Time _hrs 6.0 2.4 3.6 154.23
ActiveCustCount 4.0 4.0 .0 .00
Net Margin
90,000
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0
Gross Revenue
Discounts
Net Revenue
COGS
Margin
Merch Cost
Commissions
Recoveries
Net Margin

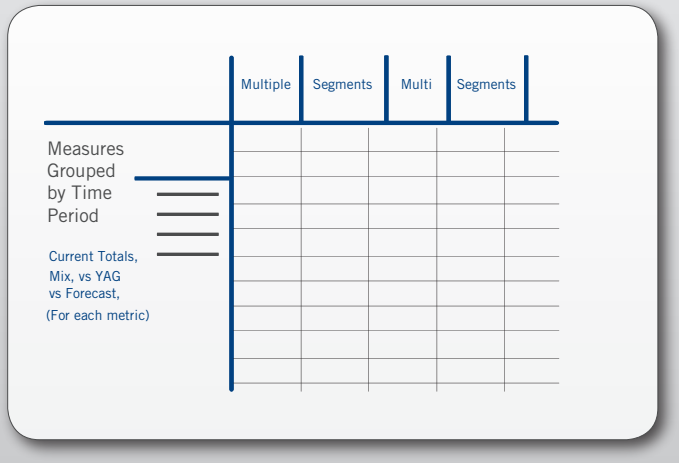
Profit and Loss Analysis

Consolidated P&L across multiple parts of the business

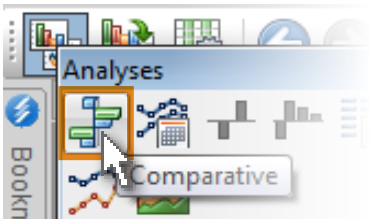
Vertically list gains & losses for all members within any group to target areas for improvement.

Example:

- Gross P & L for each region
- Sales figures and distribution stats for each division



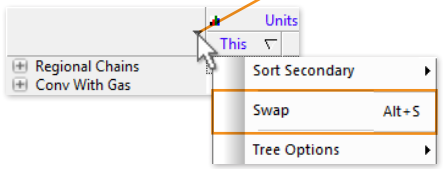
1. Analysis: choose the "Comparative"



Use the Numbers/Graph Toggle if you are not already in a grid view

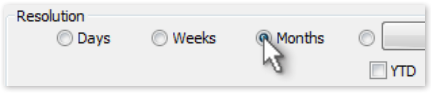
Click the visual indicator that displays on hover in the upper left grey box (or right click) to access the swap option.

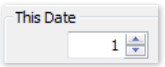
Swap rows/columns.



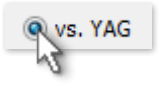
2. Time frame: Select date range (weekly, monthly, YTD, etc.).

(or select the current month if you have forecasts or "future time periods" in your data-set.)





Select comparison period

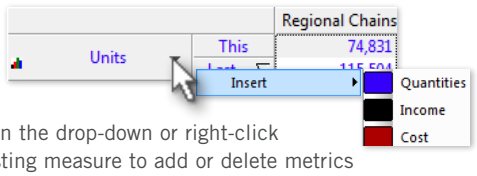


3. Context: Select any subgroupings of business segments

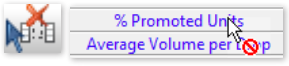
*Optionally apply any filters.

4. Metrics: Insert and / or delete

Insert



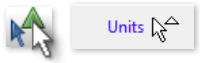
Delete



Click on the drop-down or right-click an existing measure to add or delete metrics

5. Add Variance, Mix, Budgets:

% Change and Difference

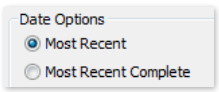


Percent of total (mix)

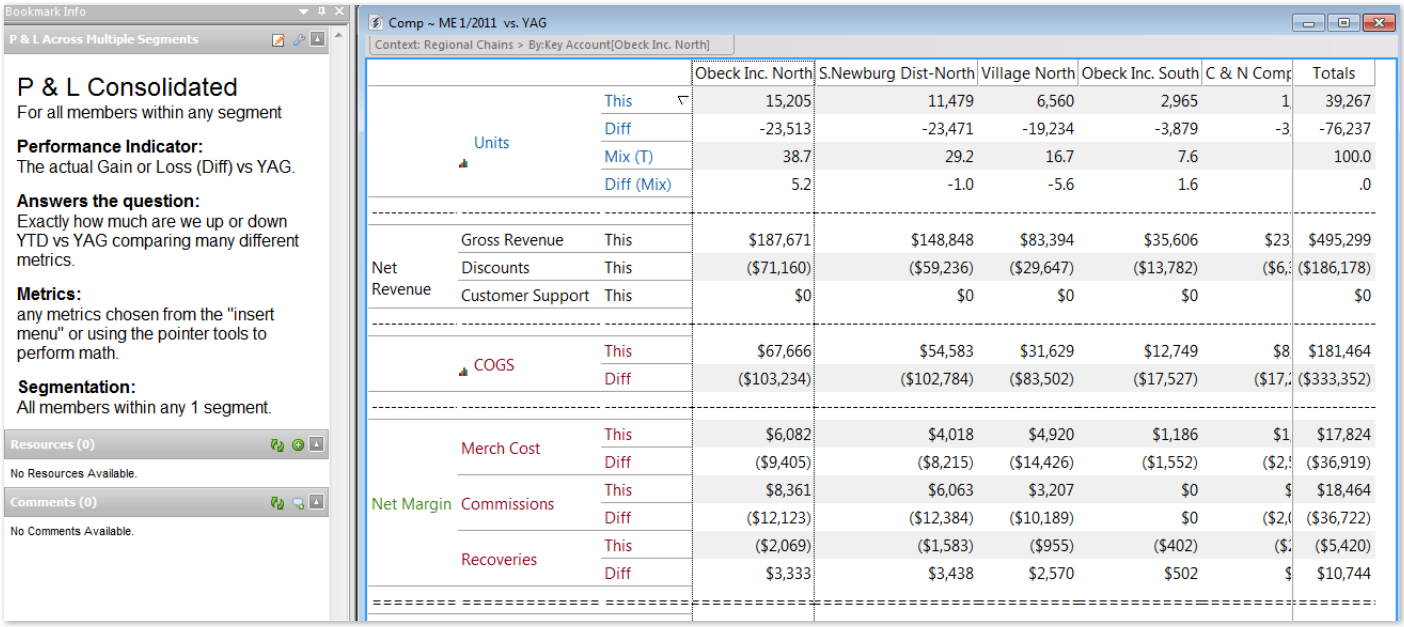
Budget/forecast: same as inserting metrics above

6. Save bookmark:

Bookmarks > Add Bookmark
Select Most Recent to automatically update



Example

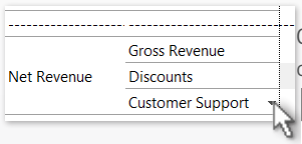

Bookmark Info
P & L Across Multiple Segments
P & L Consolidated
For all members within any segment
Performance Indicator:
The actual Gain or Loss (Diff) vs YAG.
Answers the question:
Exactly how much are we up or down YTD vs YAG comparing many different metrics.
Metrics:
any metrics chosen from the "insert menu" or using the pointer tools to perform math.
Segmentation:
All members within any 1 segment.
Resources (0)
No Resources Available.
Comments (0)
No Comments Available.
Comp ~ ME1/2011 vs. YAG
Context: Regional Chains > By:Key Account[Obeck Inc. North]

			Obeck Inc. North	S.Newburg Dist-North	Village North	Obeck Inc. South	C & N Comp	Totals
	Units	This	15,205	11,479	6,560	2,965	1	39,267
		Diff	-23,513	-23,471	-19,234	-3,879	-3	-76,237
		Mix (T)	38.7	29.2	16.7	7.6		100.0
		Diff (Mix)	5.2	-1.0	-5.6	1.6		.0
Net Revenue	Gross Revenue	This	$187,671	$148,848	$83,394	$35,606	$23	$495,299
	Discounts	This	($71,160)	($59,236)	($29,647)	($13,782)	($6,:	($186,178)
	Customer Support	This	$0	$0	$0	$0		$0
	COGS	This	$67,666	$54,583	$31,629	$12,749	$8	$181,464
		Diff	($103,234)	($102,784)	($83,502)	($17,527)	($17,:	($333,352)
Net Margin	Merch Cost	This	$6,082	$4,018	$4,920	$1,186	$1	$17,824
		Diff	($9,405)	($8,215)	($14,426)	($1,552)	($2,:	($36,919)
	Commissions	This	$8,361	$6,063	$3,207	$0	$	$18,464
		Diff	($12,123)	($12,384)	($10,189)	$0	($2,(	($36,722)
	Recoveries	This	($2,069)	($1,583)	($955)	($402)	($:	($5,420)
		Diff	$3,333	$3,438	$2,570	$502	$	$10,744

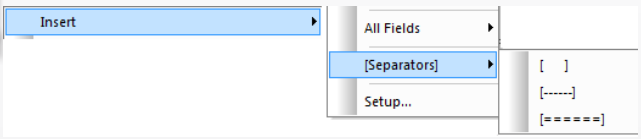
Additional Concepts:

Separators

Insert horizontal lines or spaces to separate groups of related metrics.

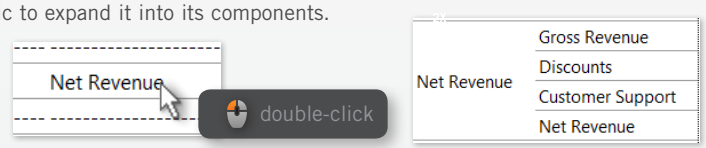


Click arrow to open menu; select Insert and then desired separators.



Expanding metrics

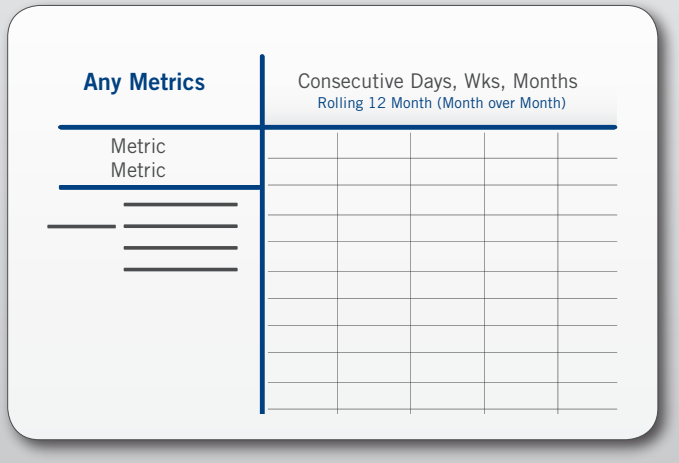
Double-click on a calculated metric to expand it into its components.



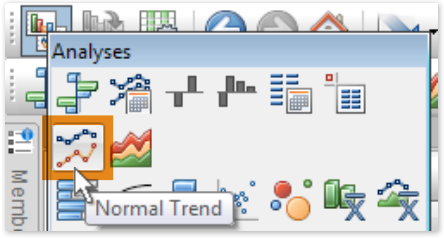
Profit and Loss Analysis

Rolling 12-month P&L

Consolidate financials or many metrics for any part of the business over time (rolling Periods, Months, Weeks, Quarters...)



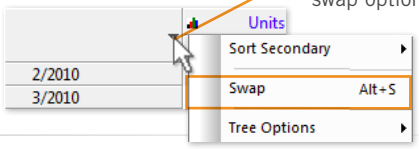
1. Analysis: choose the "Normal Trend"



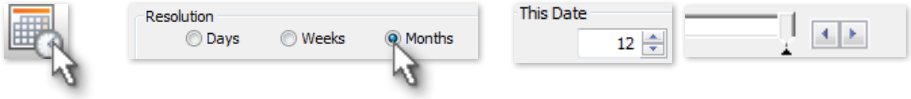
Use the Numbers/Graph Toggle if you are not already in a grid view

Left or right-click near the visual indicator that display on hover in the upper left grey box (or right click) to access the swap option.

Swap rows/columns.



2. Time frame: Select most recent 12 months.



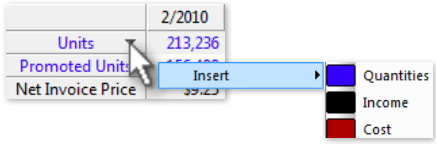
3. Context:

Select segments.

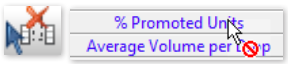
Select focus.

4. Metrics: Click label and select:

Insert



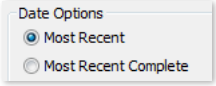
Delete



5. Save bookmark:

Bookmarks > Add Bookmark

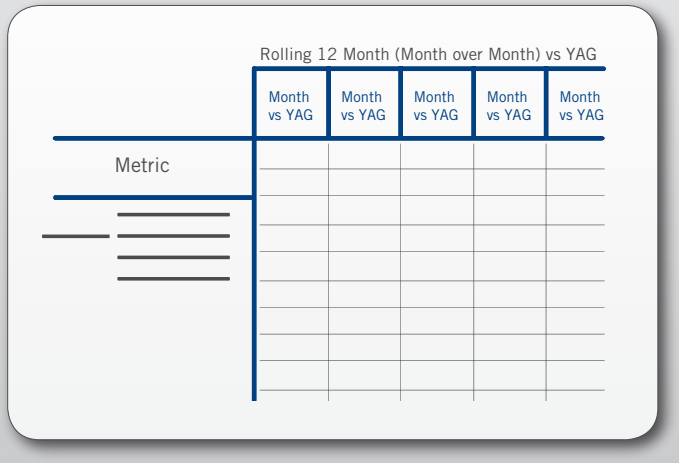
Select Most Recent to automatically update



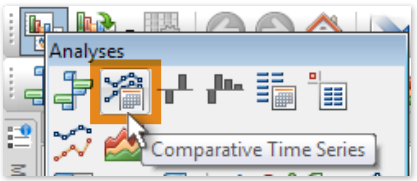
Profit and Loss Analysis

Rolling 12-month P&L vs YAG

Idenify gains & losses (diff & %change) vs Year ago or forecast with consolidated financials or other stats for any part of the business over time (rolling Periods, Months, Weeks, Quarters...)

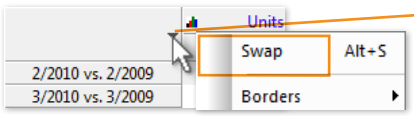


1. Analysis:
Analysis > Comparative Time Series



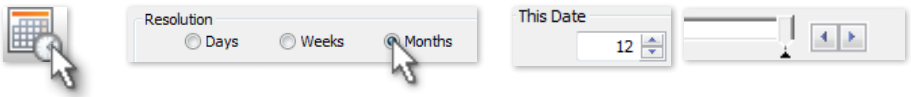
Select numbers grid.

Swap rows/columns.

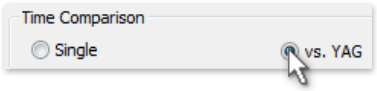


Left or right-click near the visual indicator that displays on hover in the upper left grey box (or right click) to access the swap option.

2. Time frame: Select most recent 12 months.



Select vs. YAG

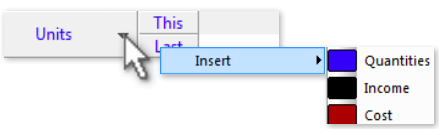


3. Context:
Select segments.

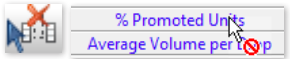
Select focus.

4. Metrics: Click label and select:

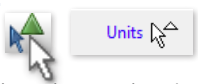
Insert



Delete

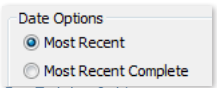


5. Add Variance and Budgets:
% Change and Difference



Budget/forecast - same as inserting metrics above

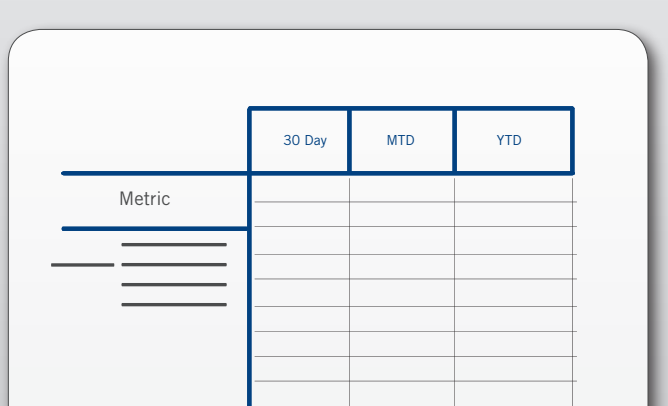
6. Save bookmark: **Bookmarks > Add Bookmark**
Select Most Recent to automatically update



Profit and Loss Analysis

P&L, for combinations of time periods

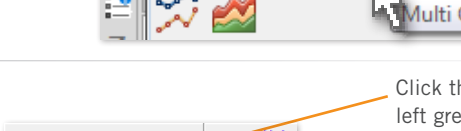
Consolidate your daily, monthly, MTD, YTD or period-based reporting into one consolidated gains & losses drill-down perspective.



1. Analysis:
Analysis > Multi Comparative

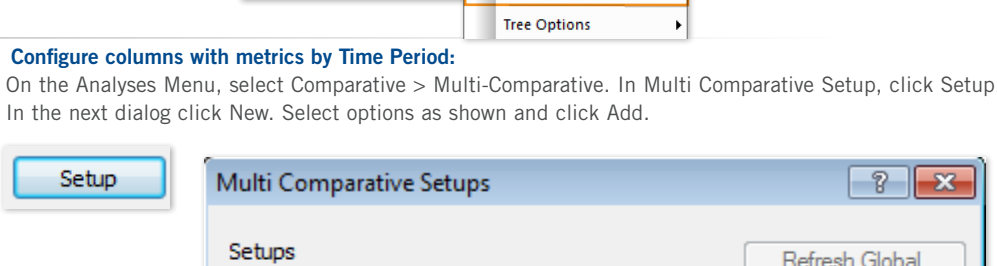
Swap rows/columns.

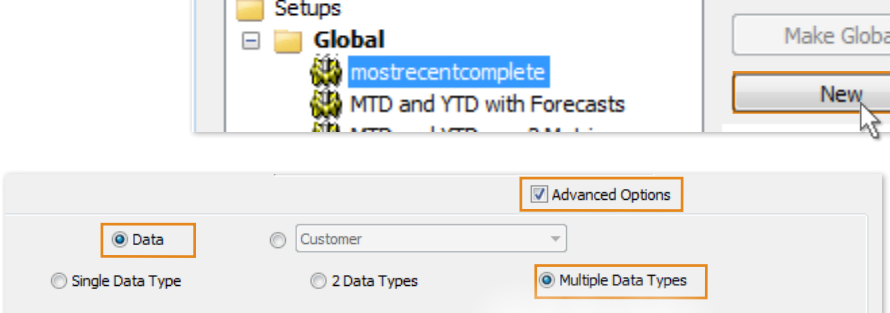
Click the visual indicator that display on hover in the upper left grey box (or right click) to access the swap option.



2. Configure columns with metrics by Time Period:

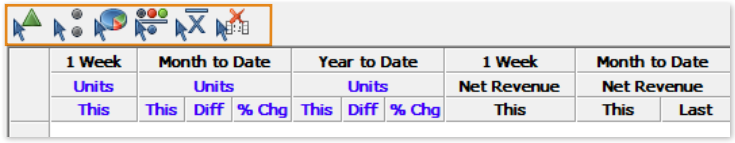
On the Analyses Menu, select Comparative > Multi-Comparative. In Multi Comparative Setup, click Setup. In the next dialog click New. Select options as shown and click Add.



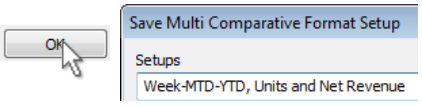


Repeat for additional metrics, time periods (week, MTD, YTD, multiple months, or multiple weeks) or budgets.

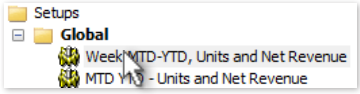
In preview pane, use pointer tools to add delta and/or mix. (Note: Metrics/time periods appear as columns in preview but will appear in rows when swapped.) Click and drag to rearrange.



Save the new setup, Then select OK.



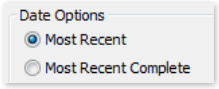
Apply setup.



3. Context: Select any subgroupings of business segments.

*Optionally, apply any filters.

4. Save bookmark:
Bookmarks > Add Bookmark
Select Most Recent to automatically update



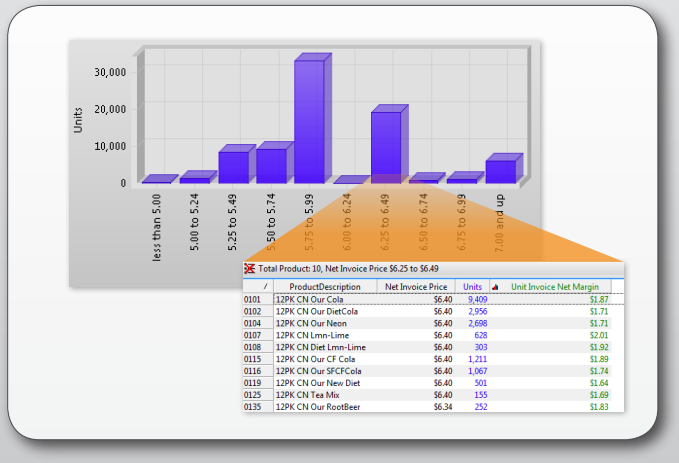
Example

			Regional Chains	Conv With Gas	Other Groceries	Mass Merchandisers	3rd Party Operators	Totals
1 Week	Units	This	12,778	7,407	5,418	4,827	3,246	55,317
Month to Date	Units	This	39,267	23,061	17,859	11,629	10,394	168,646
		Diff	-28,565	-3,959	-2,883	-5,349	-3,520	-78,708
		% Chg	-42.11	-14.65	-13.90	-31.51	-25.30	-31.82
Year to Date	Units	This	39,267	23,061	17,859	11,629	10,394	168,646
		Diff	-28,565	-3,959	-2,883	-5,349	-3,520	-78,708
		% Chg	-42.11	-14.65	-13.90	-31.51	-25.30	-31.82
1 Week	Net Revenue	This	$105,501	$83,937	$58,913	$34,194	$32,149	$537,125
Month to Date	Net Revenue	This	$309,121	$260,292	$192,872	$83,782	$91,314	$1,596,873
		Diff	($212,626)	($26,639)	($27,342)	($37,145)	($22,096)	($626,612)
		% Chg	-40.75	-9.28	-12.42	-30.72	-19.48	-28.18
Year to Date	Net Revenue	This	$309,121	$260,292	$192,872	$83,782	$91,314	$1,596,873
		Diff	($212,626)	($26,639)	($27,342)	($37,145)	($22,096)	($626,612)
		% Chg	-40.75	-9.28	-12.42	-30.72	-19.48	-28.18

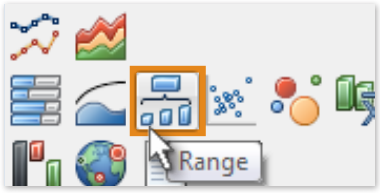
Range Analysis

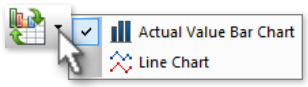
Price range analysis for a single product

How many are sold within each price range? Drill to a list of SKUs sold in any range. This analysis will group transactions within ranges for any measure you choose. Visual results help identify how high an item can be priced before demand significantly drops.


Units
30,000
20,000
10,000
0
less than 5.00
5.00 to 5.24
5.25 to 5.49
5.50 to 5.74
5.75 to 5.99
6.00 to 6.24
6.25 to 6.49
6.50 to 6.74
6.75 to 6.99
7.00 and up
Total Product: 10, Net Invoice Price $6.25 to $6.49
ProductDescription
Net Invoice Price
Units
Unit Invoice Net Margin
0101 12PK CN Our Cola $6.40 9,409 $1.87
0102 12PK CN Our DietCola $6.40 2,956 $1.71
0104 12PK CN Our Neon $6.40 2,698 $1.71
0107 12PK CN Lmn-Lime $6.40 628 $2.01
0108 12PK CN Diet Lmn-Lime $6.40 303 $1.92
0115 12PK CN Our CF Cola $6.40 1,211 $1.89
0116 12PK CN Our SFCFCola $6.40 1,067 $1.74
0119 12PK CN Our New Diet $6.40 501 $1.64
0125 12PK CN Tea Mix $6.40 155 $1.69
0135 12PK CN Our RootBeer $6.34 252 $1.83

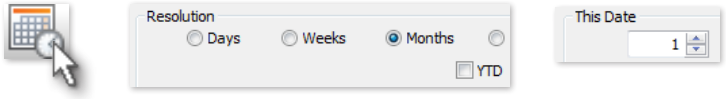
1. Analysis: choose the "Range"



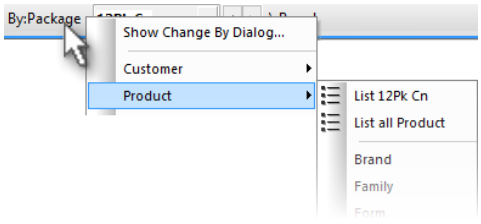


Click the graph format arrow and select Actual Value Bar Chart.

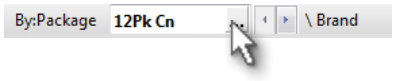
2. Time frame: Select most recent week, MTD, YTD, or any other time frame.



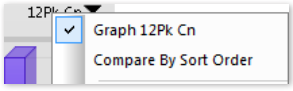
3. Context: Select a product segment



Focus on desired category.



Graph focus only
(click label above graph)

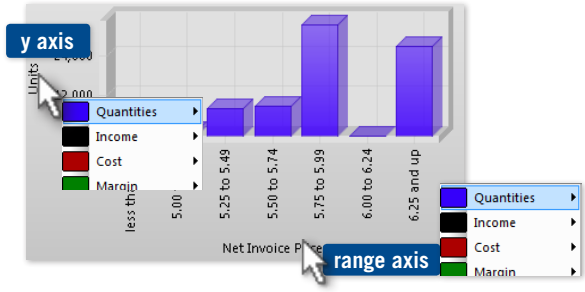


Optionally, apply customer segment filter (e.g., single region, sales rep, channel, etc.). See "Choose the Context" in the SIM Getting Started Guide.

4. Metrics: Click label and select:

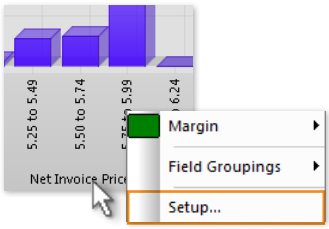
range axis - Choose average price metric. (or similar)

y axis - Choose sales volume metric. (or your own choice)

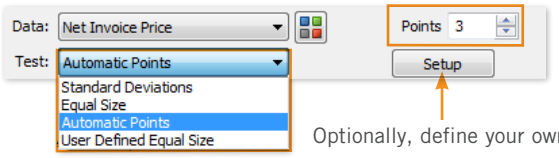


5. Price ranges: Choose how to segregate price ranges.

Click range axis label and select Setup.



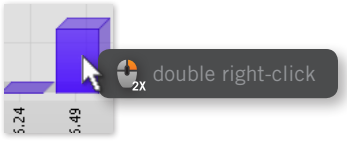
Select method for determining ranges and # of ranges.



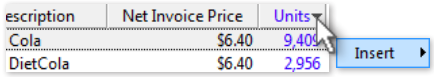
Optionally, define your own custom ranges.

6. SKU list:

Double right-click to list individual SKUs for that price range.



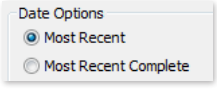
Insert other relevant metrics such as margin per unit.



7. Save bookmark:

Bookmarks > Add Bookmark

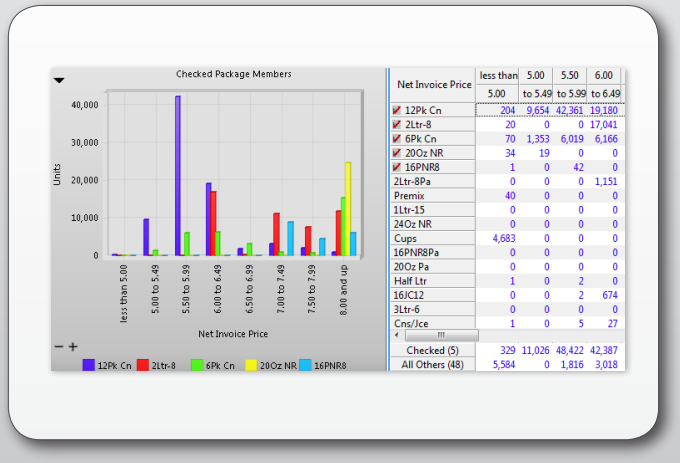
Select Most Recent to automatically update



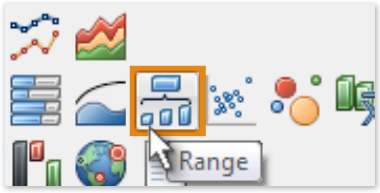
Range Analysis

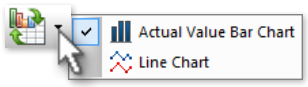
Price range analysis for multiple products

Compare pricing for multiple products; identify "sweet spots" where price can be positioned highest while still avoiding demand dropping off too dramatically.



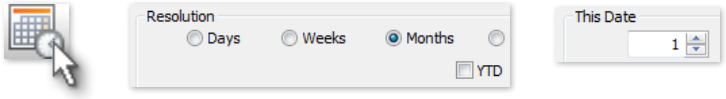
1. Analysis: choose the "Range"



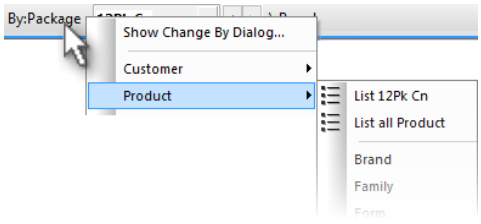


Click the graph format arrow and select Actual Value Bar Chart.

2. Time frame: Select most recent week, MTD, YTD, or any other time frame.

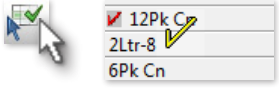


3. Context: Select a product segment

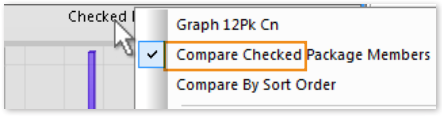


Pick products to graph:

Check-mark products.



Graph checked items
(click label above graph)

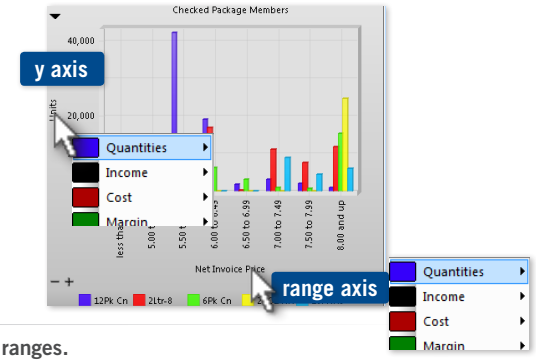


*Optionally, apply any filters.

4. Metrics: Click label and select:

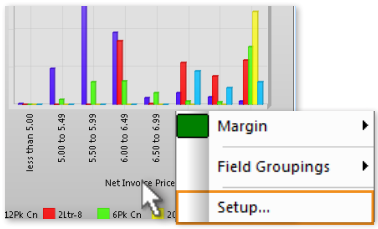
range axis - Choose average price metric.

y axis - Choose sales volume metric.

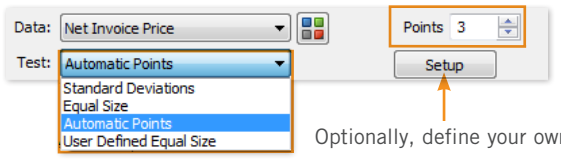


5. Price ranges: Choose how to segregate price ranges.

Click range axis label and select Setup.



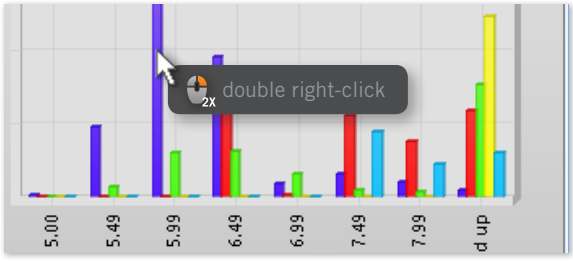
Select method for determining ranges and # of ranges.



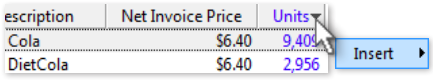
Optionally, define your own custom ranges.

6. SKU list:

Double right-click to list individual SKUs for that price range.



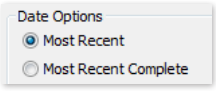
Insert other relevant metrics such as margin per unit.



7. Save bookmark:

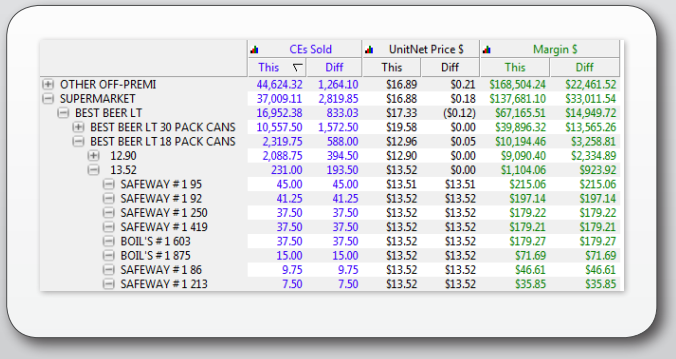
Bookmarks > Add Bookmark

Select Most Recent to automatically update



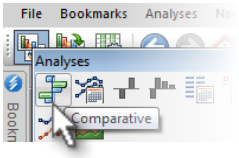
Demand by price point and customer

Are products being sold at price points outside the norm for any given market? Identify the prices that work best for any chain, market or individual customer.



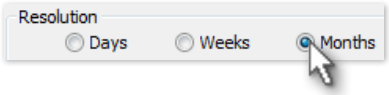
	CEs Sold		UnitNet Price $		Margin $	
	This	Diff	This	Diff	This	Diff
⊞ OTHER OFF-PREMI	44,624.32	1,264.10	$16.89	$0.21	$168,504.24	$22,461.52
⊟ SUPERMARKET	37,009.11	2,819.85	$16.88	$0.18	$137,681.10	$33,011.54
⊟ BEST BEER LT	16,952.38	833.03	$17.33	($0.12)	$67,165.51	$14,949.72
⊞ BEST BEER LT 30 PACK CANS	10,557.50	1,572.50	$19.58	$0.00	$39,896.32	$13,565.26
⊟ BEST BEER LT 18 PACK CANS	2,319.75	588.00	$12.96	$0.05	$10,194.46	$3,258.81
⊞ 12.90	2,088.75	394.50	$12.90	$0.00	$9,090.40	$2,334.89
⊟ 13.52	231.00	193.50	$13.52	$0.00	$1,104.06	$923.92
⊟ SAFEWAY # 1 95	45.00	45.00	$13.51	$13.51	$215.06	$215.06
⊟ SAFEWAY # 1 92	41.25	41.25	$13.52	$13.52	$197.14	$197.14
⊟ SAFEWAY # 1 250	37.50	37.50	$13.52	$13.52	$179.22	$179.22
⊟ SAFEWAY # 1 419	37.50	37.50	$13.52	$13.52	$179.21	$179.21
⊟ BOIL'S # 1 603	37.50	37.50	$13.52	$13.52	$179.27	$179.27
⊟ BOIL'S # 1 875	15.00	15.00	$13.52	$13.52	$71.69	$71.69
⊟ SAFEWAY # 1 86	9.75	9.75	$13.52	$13.52	$46.61	$46.61
⊟ SAFEWAY # 1 213	7.50	7.50	$13.52	$13.52	$35.85	$35.85

1. Analysis: choose the "Comparative"

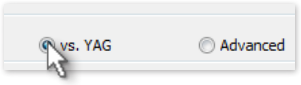


Use the Numbers/Graph Toggle if you are not already in a grid view

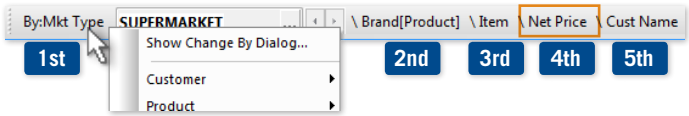
2. Time frame: Select most recent week, MTD, YTD, or any other time frame.



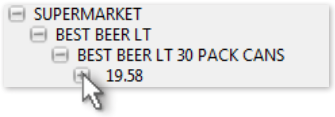
Select another period to compare against (YAG or Advanced).



3. Context: Select subgroupings
(up to five levels to show market type/channel, brand, product, price, and customer)

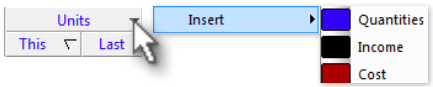


Expand desired groupings.

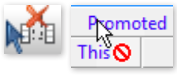


4. Metrics: volume, price, margin

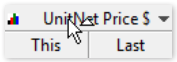
Insert



Delete



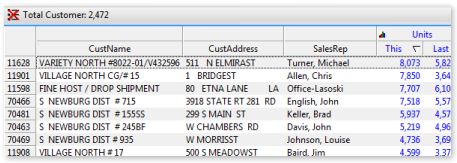
Difference / %change
To make it easier to find price change occurances



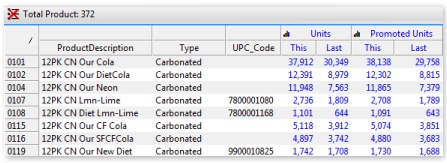
5. Save bookmark: Bookmarks > Add Bookmark

Advanced Concepts

Key lists: list out key members (customers, products, etc.) from any analysis type.

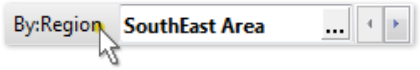

Total Customer: 2,472
CustName
CustAddress
SalesRep
Units
This
Last
11628 VARIETY NORTH #8022-01/V432596 511 N ELMIRAST Turner, Michael 8,073 5,82
11901 VILLAGE NORTH CG/# 15 1 BRIDGEST Allen, Chris 7,850 3,64
11598 FINE HOST / DROP SHIPMENT 80 ETNA LANE LA Office-Lasoski 7,707 6,10
70466 S NEWBURG DIST # 715 3918 STATE RT 281 RD English, John 7,518 5,57
70481 S NEWBURG DIST # 1555S 299 S MAIN ST Keller, Brad 5,937 4,57
70463 S NEWBURG DIST # 245BF W CHAMBERS RD Davis, John 5,219 4,96
70469 S NEWBURG DIST # 935 W MORRISST Johnson, Louise 4,736 3,69
11908 VILLAGE NORTH # 17 500 S MEADOWST Baird, Jim 4,599 3,37

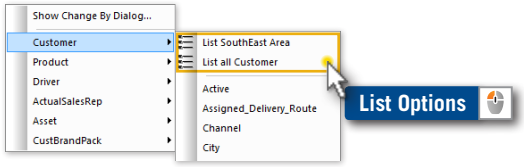
Customer List


Total Product: 372
ProductDescription
Type
UPC_Code
Units
Promoted Units
This
Last
0101 12PK CN Our Cola Carbonated 37,912 30,349 38,138 29,758
0102 12PK CN Our DietCola Carbonated 12,391 8,979 12,302 8,815
0104 12PK CN Our Neon Carbonated 11,948 7,563 11,865 7,379
0107 12PK CN Lmn-Lime Carbonated 7800001080 2,736 1,809 2,708 1,789
0108 12PK CN Diet Lmn-Lime Carbonated 7800001168 1,101 644 1,091 643
0115 12PK CN Our CF Cola Carbonated 5,118 3,912 5,074 3,851
0116 12PK CN Our SFCFCola Carbonated 4,897 3,742 4,880 3,683
0119 12PK CN Our New Diet Carbonated 9900010825 1,742 1,708 1,730 1,688

Product List

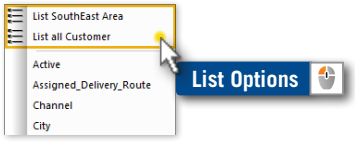
To open a key list (with key tabs off):

1. 

2. 

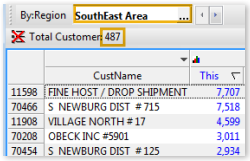
To open a key list (with key tabs on):

1.

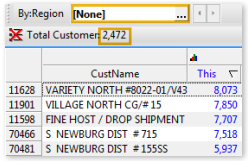
2. 

List options

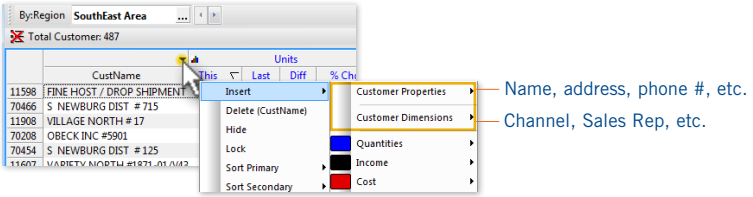
List for one attribute grouping:
Only lists members with data for the selected grouping.


By:Region
SouthEast Area
Total Customer: 487
CustName
This
11598 FINE HOST / DROP SHIPMENT 7,707
70466 S NEWBURG DIST # 715 7,518
11908 VILLAGE NORTH # 17 4,599
70208 OBECK INC #5901 3,011
70454 S NEWBURG DIST # 125 2,934

Lists all members with data.



Insert multiple data fields or descriptions related to the list



To list information that relates to other parts of the business (like customer and product descriptions together in a consolidated view) utilize the line item analysis and filter first so that the results are a manageable list length.

Advanced Concepts

Of These: "Of These" creates an automated exception listing or filter to show data for the members that pass or fail a numerical test. The results can be updated automatically using "dynamic" testing criteria to show the members that pass or fail on any given date within any subset of the data. This type of filter is only available for members at the lowest level (e.g., customers, products, assets, etc.).

Customer: Non-Buyers [Dynamic Date]
Modifiers: Calendar Days
Total Customer: 343

	CustName	Units This	Units Last	Units Diff
91838	CORNELL UNIVERSITY	0	400	-400
70813	FAIRE DISTRIBUTORS # 8405	0	254	-254
10637	STRICKLAND BEV	0	214	-214
02893	CORNELL UNIVERSITY VENDING	0	208	-208
04194	FAIRE DISTRIBUTORS # 0595	0	188	-188

1. **Select and modify the view on which to base the Of These. See tips on the right.**

2. **Click on "Collections Plus/Of These"**

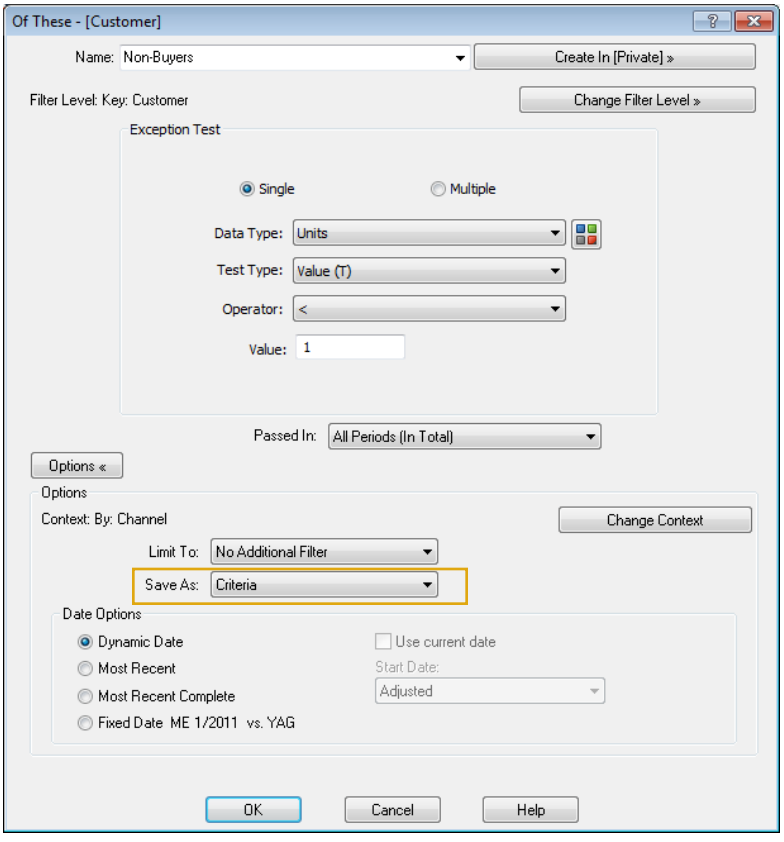
Tips:

- In general, we recommend removing all filters before creating the Of These collection.
- Select the initial date settings (for example, three months) before creating the Of These collection. Depending on the settings, this date range may dynamically update based on the view when you turn on the Of These.
- Turn on or off equivalients as desired. The Of These stores the equivalent settings used when it was created.

3. **Enter a name, pick a global or private folder.**

4. **Set the test level to a product or customer test.**
   Then, use one or more criteria (for example, units < 1).

5. **Save as criteria in order to automatically update the Of These collection by re-running the test whenever you turn it on. Otherwise, the Of These stores a static list of members. For information on other settings, see the "SIM User Manual."**

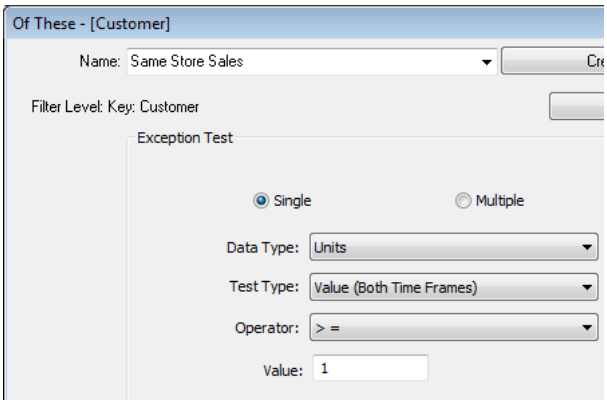


Advanced Concepts

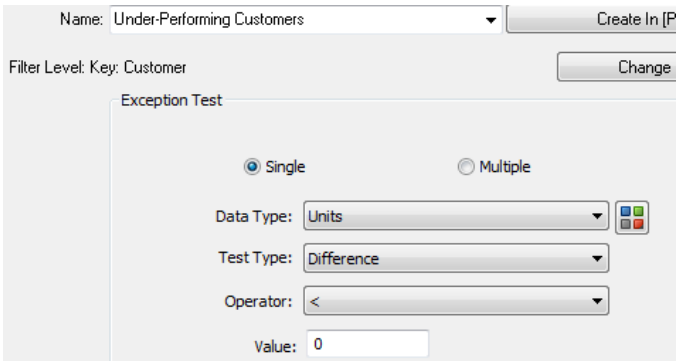
Of These (continued)

Examples

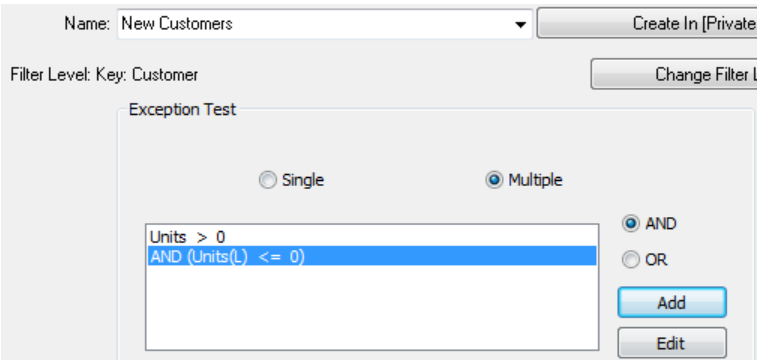
Same Store Sales (i.e. active this year and last):



Underperforming customers:



New customers:



Advanced Concepts

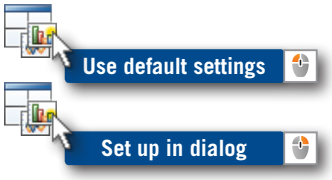
Note: MultiView needs to be enabled for each user in the admin utility

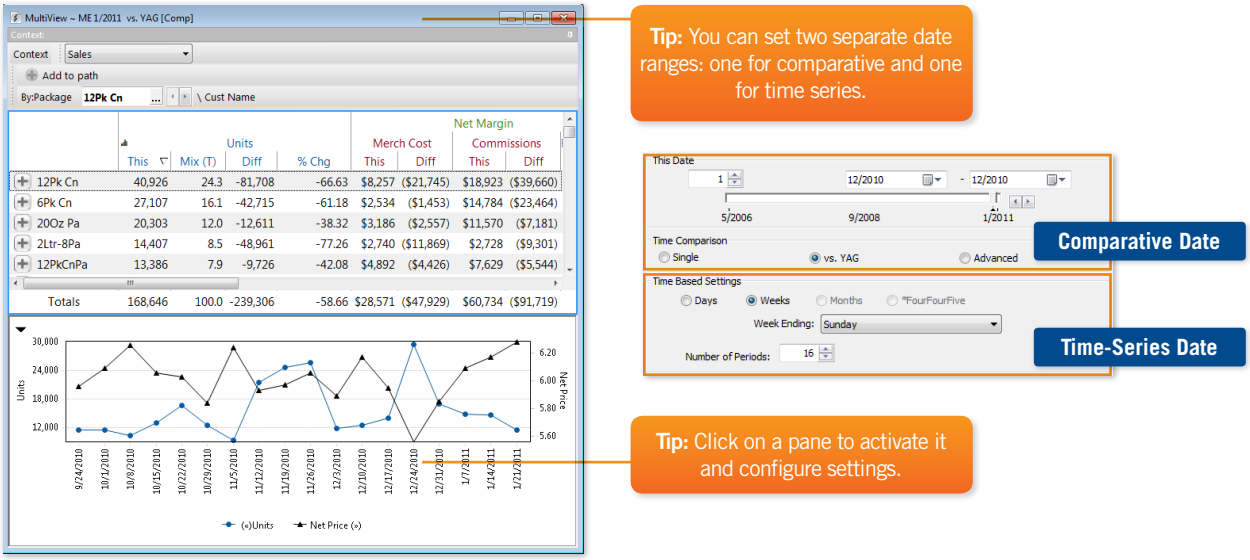
MultiView

Control multiple analyses with a single context control in one window.

Step 1: Split the window (2 or 4 panes)

Step 2: Turn on MultiView





With MultiView on, changing the context (drilling down, changing the focus, etc.), updates all panes in the window.

Turns off MultiView

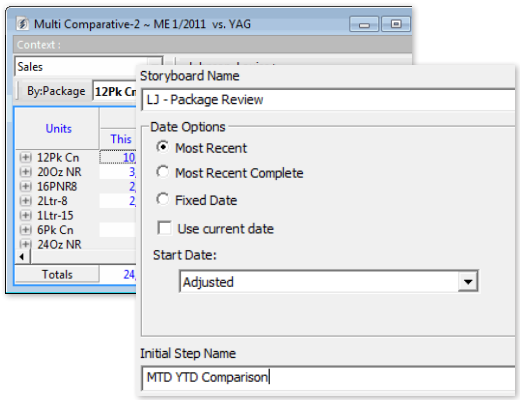
Advanced Concepts
Save & Share Intelligence

Note: Storyboards need to be enabled for each user in the admin utility

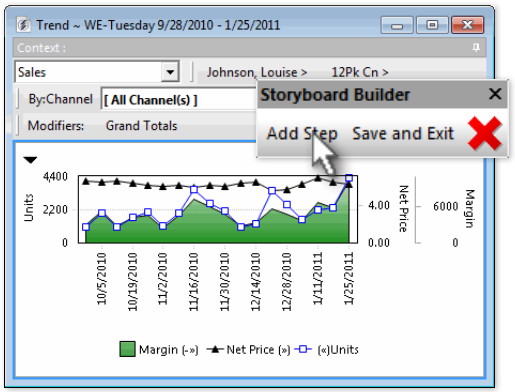
Storyboards—let users drill down through a set of views to identify root cause without needing to configure the context, analysis type, or other settings. Power users can create a storyboard to share. Users can open the storyboard and drill down on whatever item interests them.

Create a storyboard

Step 1: Configure and save the storyboard starting point.
(Options → Storyboard → Builder → Start)

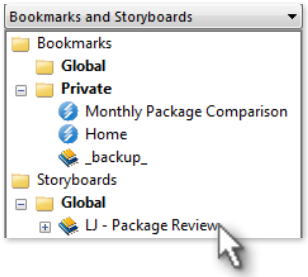


Step 2: Drill down, configure, and save next step…continue to end of storyboard.

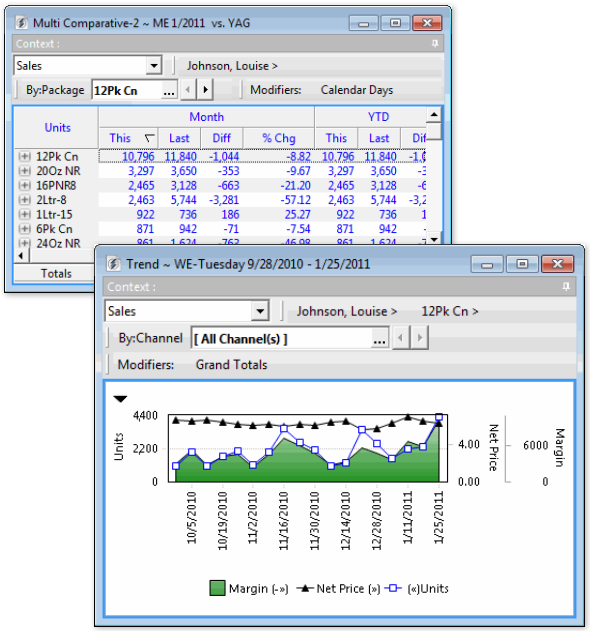


View a storyboard

Step 1: Open storyboard.
(View → Storyboard/Bookmark Panel)



Step 2: Double-click to drill down on any item/date.



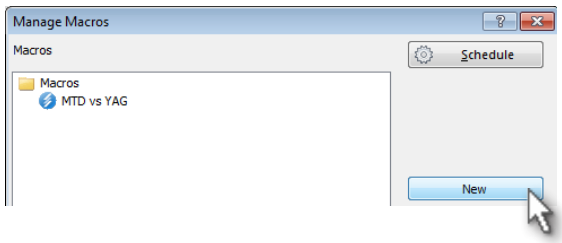
Advanced Concepts
Save & Share Intelligence

Macros—let users easily email, save, or print commonly used results. Macros save nearly every aspect of any given view in addition to output settings such as email, and/or save as file (Excel, TXT, HTM, etc.). Users simply run the macro, either in SIM or as part of an automated process, in order to output results.

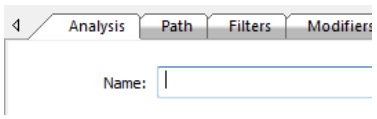
Create a macro

Step 1: Configure the view to show the desired results (choose analysis, choose context, set timeframe, etc.). The macro results are based on the view that is selected when the macro is created.

Step 2: Create new macro: Select Options → Macros; click New.

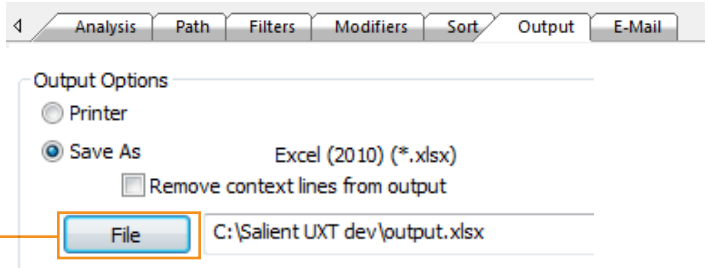


Step 3: In the Analysis tab, type a macro name.



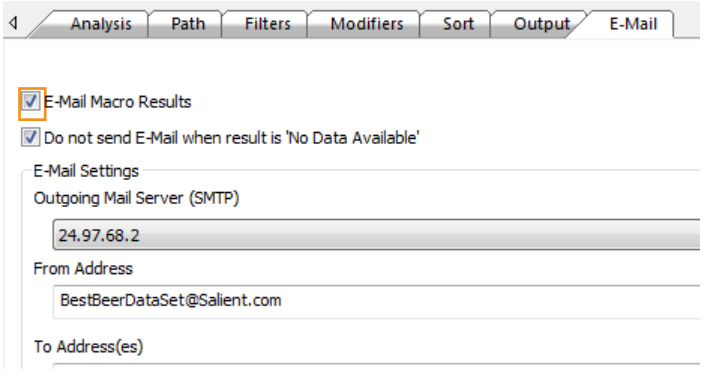
Step 4: Select Output settings. Click the Output tab. In the bottom of the dialog, choose to print or create a file (Save As). To email results, choose the Save As option and configure email options in the next step.

To select the file type, click the file button.



Step 5: Select Email settings (when emailing results only). Click the Email tab. (Tip: Contact your administrator if you do not see this tab. Some administrative setup is required.)

Check the Email Macro Results box and enter settings.



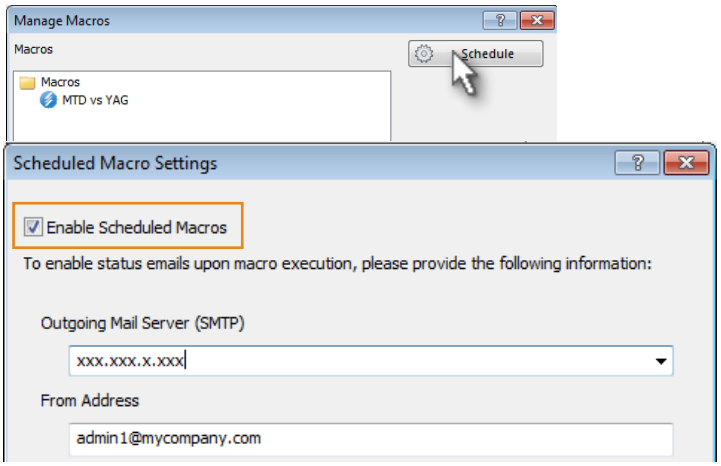
Advanced Concepts

Macros (continued)

Automate/schedule macros

You can automatically run macros as part of scheduled tasks. The following setup is required:

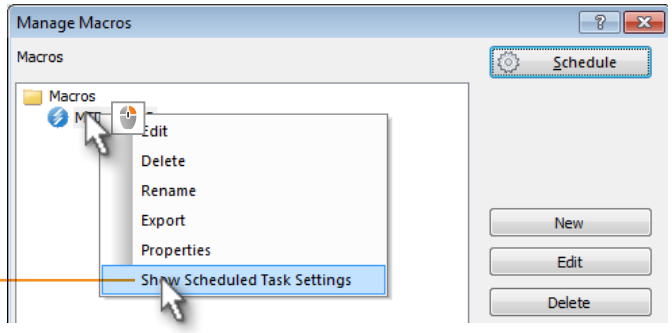
Step 1: If you haven't already, enable scheuled macros by clicking the Schedule button and checking "Enable Scheduled Macros."

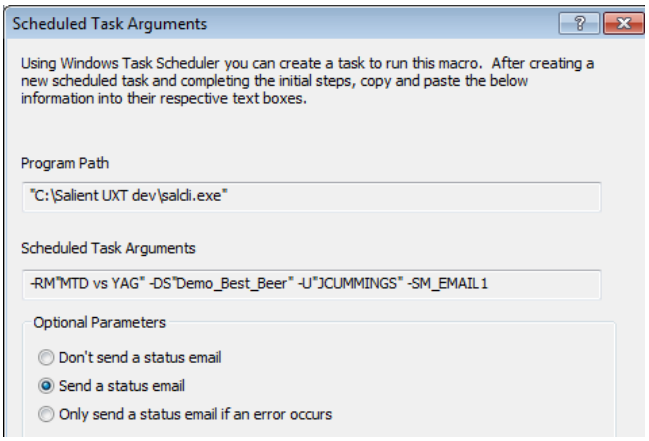


Step 2: Enter settings for status emails sent for scheduled macros. Note that this is different than the settings for macro results emails (see previous page).

Step 3: In your task scheduling program, set up a task to run the macro according to your preferrred schedule.

You can find the necessary information, including program path and scheduled task arguments by right-clicking on the macro and selecting Show Scheduled Task Settings.




Scheduled Task Arguments
Using Windows Task Scheduler you can create a task to run this macro. After creating a new scheduled task and completing the initial steps, copy and paste the below information into their respective text boxes.
Program Path
"C:\Salient UXT dev\salcli.exe"
Scheduled Task Arguments
-RM"MTD vs YAG" -DS"Demo_Best_Beer" -U"JCUMMINGS" -SM_EMAIL 1
Optional Parameters
Don't send a status email
Send a status email
Only send a status email if an error occurs

Knowledge Manager enables users to organize thoughts or "soft knowledge" for collaboration.

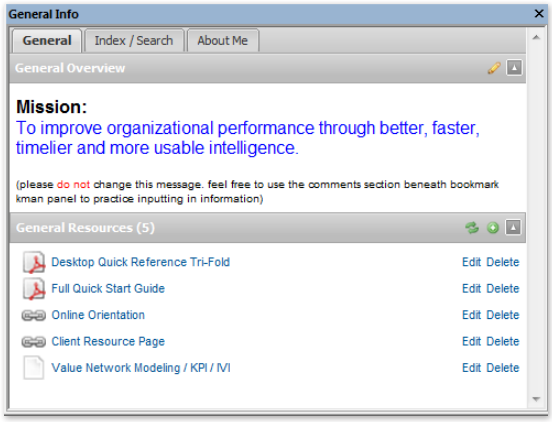
Each section of the panels contains text, file or object entry tools.

The General Info panel has three tabs:

General: adds global information available to most users

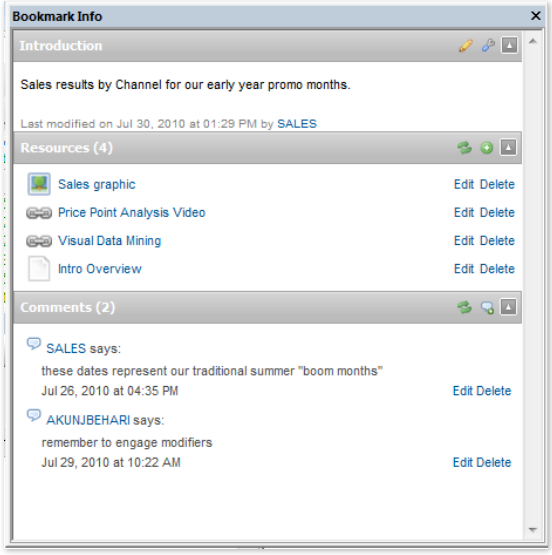
Index/Search: adds searchable information such as a glossary of terms

About me: adds personal information on authorized authors of Knowledge Manager entries


General Info
General
Index / Search
About Me
General Overview
Mission:
To improve organizational performance through better, faster, timelier and more usable intelligence.
(please do not change this message. feel free to use the comments section beneath bookmark kman panel to practice inputting in information)
General Resources (5)
Desktop Quick Reference Tri-Fold
Edit Delete
Full Quick Start Guide
Edit Delete
Online Orientation
Edit Delete
Client Resource Page
Edit Delete
Value Network Modeling / KPI / IVI
Edit Delete

The Bookmark Info panel allows users who create bookmarks whether global or private to write a description and purpose for the bookmark.

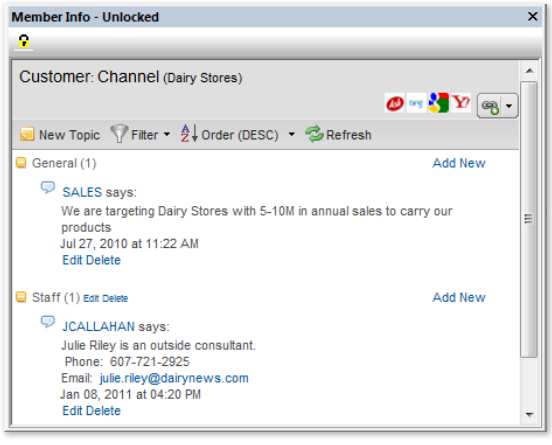
Resources (links to web pages, pictures or documents) or comments can be included as future reference materials become available.



The Member Info panel allows you to connect media or non-media information to specific customers.

The Member Info panel allows you to connect information to specific customers, products, regions, sales representatives, brands, or any other part of the business.

Share comments or upload files or links to other related websites. Examples include news stories, photographs, events, contact information, security issues, etc.



"If people do not see the process, they can not improve it."

W. Edwards Deming

About the Solution

Salient Management Company's visual data mining solution enables users to evaluate results, identify outliers and their root causes, and refine managerial decision-making continuously. Drawing from existing systems, the solution automatically computes net value added by sales activity – revenue, costs, margins, adjustments – which is then made available for interactive interrogation and exploitation. Embedded expert analytics let business managers quickly locate the short lists of problems and opportunities they can attack immediately and monitor continuously. Founded in 1986, Salient today serves more than 115,000 users in 61 countries. For more information visit salient.com.

We'll make your information actionable, your organization transparent and every process more controllable than ever before.

To discuss how Salient can help, call (607) 739-4511, or email the Salient Management Institute at smi@salient.com.

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